ACQUISITION INTEGRATION TOOLKIT

COMPANION REFERENCE

Workplace Safety Terms, Acronyms and FAQs

A plain-language companion to the Workplace Safety Acquisition Guide

Companion Reference · Version 1.0 · November 2026

Use this reference alongside the Workplace Safety Acquisition Guide when requesting seller records, reviewing findings and planning the transition. It is written for business leaders and deal teams, not as a technical safety manual.

How to use this reference

Terms are grouped in four sections, followed by sixteen frequently asked questions. Acronyms are spelled out under each term, and bracketed numbers point to the official sources at the end. Definitions are simplified for business readers.

Section	Covers
1. Transaction and decision terms	The language of the deal and the decisions it requires.
2. Safety concepts	Understand the hazard, the protection and the evidence.
3. Common acronyms	A quick reference for seller records and safety discussions.
4. Records, rates and insurance	Use several sources. No single measure establishes that a workplace is safe.
Frequently asked questions	Reviewing the evidence, making decisions and managing the transition

SECTION 1

Transaction and decision terms

The language of the deal and the decisions it requires.

Term	What it means and what to check
Due diligence	The investigation used to understand a business before a purchase. Safety due diligence tests both the available records and the conditions under which work is actually performed.
Acquisition target / seller	The business being considered for purchase, and the party selling it. Confirm which locations, people and operations are actually included in the transaction.
Closing / Day 1	Closing is the completion of the transaction. Day 1 is the start of operations under the new ownership. Closing alone does not establish that work is safe.
Material finding	An issue significant enough to affect safety, cost, operations or transaction decisions. A rare event can still be material if the potential harm is severe.
Remediation / corrective action	Work undertaken to correct a problem. A remediation budget estimates the resources needed; a corrective-action record identifies the fix, owner, deadline and evidence of completion.
Interim control	A temporary protective measure used while a permanent fix is arranged. It must adequately protect people; a deadline or budget approval is not itself a control.
Operational readiness	Evidence that the affected work can proceed safely, including any restrictions. Assess readiness by activity or location, rather than as a single yes or no decision for the whole business.

SECTION 2

Safety concepts

Understand the hazard, the protection and the evidence.

Term	What it means and what to check
Hazard / risk	A hazard is something with the potential to cause harm. Risk considers how likely harm is and how severe it could be, given actual exposure and existing protections.
Exposure	Contact with a hazard, such as noise, a chemical or moving equipment. Consider who is exposed, how often, for how long and at what intensity.
Hierarchy of controls	A preferred order for addressing hazards: eliminate the hazard, substitute a safer alternative, use engineering controls, use administrative controls, then use personal protective equipment. Several layers may be needed. [1]
Engineering / administrative controls	Engineering controls change equipment or the physical environment, such as guarding or ventilation. Administrative controls change how work is organized, such as procedures, scheduling or access limits. [1]

Term	What it means and what to check
Incident / near miss	An incident is a work-related event that caused or could have caused harm. A near miss caused no injury but revealed a hazard. Internal definitions vary, so confirm what a dataset includes.
Root cause	An underlying condition that allowed an incident to happen. Look at equipment, work design, supervision and systems instead of stopping at a statement such as "employee error."
Machine guarding / hazardous energy	Guarding protects people from dangerous machine parts. Hazardous energy includes electrical, mechanical, hydraulic, pneumatic, thermal and other energy that could injure someone during work.
Stop-work authority	The organization's defined authority and process to halt unsafe work and escalate concerns. Establish who can authorize a restart and what evidence they need.
Deferred maintenance	Maintenance or repairs that have been postponed. Evaluate the hazards, downtime and replacement costs involved, rather than treating the backlog only as a financial issue.
Verification / effectiveness review	Verification checks that a promised action happened. An effectiveness review checks whether it actually controlled the hazard and whether the problem is recurring.

SECTION 3

Common acronyms

A quick reference for seller records and safety discussions.

Term	What it means and what to check
OSHA *Occupational Safety and Health Administration*	The federal workplace safety and health agency. OSHA-approved State Plans run programs for covered workplaces in their states; identify which authority applies. [2]
EHS / HSE *Environment, Health and Safety / Health, Safety and Environment*	Common names for the function that oversees these risks. This reference focuses on workplace safety; environmental diligence may need a separate review.
PPE *Personal Protective Equipment*	Equipment worn to reduce exposure, such as eye protection, gloves, hard hats or respirators. Selection must match the hazard; PPE is one layer of protection. [1]
LOTO *Lockout/Tagout*	Procedures for controlling hazardous energy during servicing and maintenance. Ask for the procedures, role-specific training and evidence they are used.
HazCom / SDS *Hazard Communication / Safety Data Sheet*	HazCom covers workplace chemical hazard information. An SDS describes a chemical's hazards, safe handling and protective measures.
JHA / JSA *Job Hazard Analysis / Job Safety Analysis*	A task-based review of work steps, hazards and controls. The terms are often used interchangeably; confirm how the seller uses each one.

Term	What it means and what to check
SOP *Standard Operating Procedure*	Written instructions for carrying out work consistently. A policy states expectations and authority; an SOP explains the steps. Neither proves the steps are followed.
EAP *Emergency Action Plan*	In a safety context, a plan covering emergency response actions and responsibilities. In HR records, EAP may instead mean Employee Assistance Program.
IH / OEL *Industrial Hygiene / Occupational Exposure Limit*	Industrial hygiene evaluates and controls workplace exposures; an OEL is a limit used to assess exposure to a substance. Confirm the applicable legal limit and any advisory benchmark with a qualified specialist.
CAP / CAPA *Corrective Action Plan / Corrective and Preventive Action*	Common labels for tracking fixes and the steps that prevent recurrence. Ask how completion and effectiveness are confirmed.

SECTION 4

Records, rates and insurance

Use several sources. No single measure establishes that a workplace is safe.

Term	What it means and what to check
OSHA Forms 300, 300A and 301	Form 300 is the log of recordable work-related injuries and illnesses, 300A is the annual summary, and 301 captures details of individual cases. Equivalent forms may be used, and some employers are exempt from routine recordkeeping. [3]
Recordable / reportable	A recordable case meets OSHA criteria for entry in required injury records. A reportable event requires separate notice to the regulator. These are different obligations; an exemption from routine logs does not necessarily remove severe-event reporting duties. [2, 3]
TRIR *Total Recordable Incident Rate*	Also called the total recordable case rate. Calculate it as recordable cases × 200,000 ÷ employee hours worked, for the same period and scope. The 200,000 represents 100 full-time workers working 2,000 hours each. [4]
DART *Days Away, Restricted or Transferred*	A rate based on cases involving days away from work, restricted work or job transfer. Calculate it as qualifying cases × 200,000 ÷ employee hours worked. Count cases, not total days. [4]
Leading / lagging indicators	Leading indicators track preventive activity, such as timely hazard correction. Lagging indicators track past outcomes, such as injuries. Review both, including how well incidents are reported.
Workers' compensation / loss run	Workers' compensation provides benefits for work-related injury or illness under applicable law. A loss run is an insurer's claims-history report, useful for comparing claims with incident records, although the two need not match one for one.
EMR *Experience Modification Rate*	Also called an experience modifier or mod. An insurance rating factor reflecting loss experience under the applicable rating system. It is not a complete measure of current safety performance.

Term	What it means and what to check
Paid / reserved / incurred losses	Paid losses are amounts already paid. Reserves are estimates of future claim payments. Incurred losses usually combine paid amounts and outstanding reserves; confirm the report's definitions, valuation date and treatment of expenses.
Citation / abatement	A citation alleges a safety violation; abatement means correcting it. Review current status, required correction dates, any contest or settlement, and evidence of correction, and have advisors review the legal implications.

FREQUENTLY ASKED QUESTIONS

Reviewing the evidence

1. Where should we begin?

Start with what work happens at each location, who performs it and which hazards could cause serious harm. Use that picture to prioritize site visits, record requests and specialist reviews.

2. How many years of information should we request?

The guide recommends three to five years of available injury history. That is a diligence starting point, not a universal retention rule. Ask for older significant events and unresolved matters where relevant.

3. Does "no OSHA citations" mean the business is safe?

No. The absence of citations does not show that every hazard has been identified or controlled. Compare documents with site observations, worker input, maintenance history and incident trends.

4. What if the seller has no OSHA logs?

Ask why. A recordkeeping exemption may apply, or records may be missing. Establish the applicable requirement, document the explanation and review other incident and claim evidence. Do not treat missing logs as zero injuries. [2, 3]

5. Should OSHA records and insurance claims match exactly?

No. OSHA recordability and workers' compensation eligibility use different tests. Compare them to identify questions, then investigate the differences rather than assuming either list is wrong.

6. Is a low TRIR, DART or EMR enough to approve operations?

No. Review case details, hours worked, reporting practices, serious exposures and current controls. Small workforces can have volatile rates, and comparisons should use similar operations and consistent data.

7. Does an OSHA 10- or 30-hour card prove someone is qualified?

No. It shows completion of general Outreach training, not a professional certification or license, and it does not replace training required by specific OSHA standards. Verify task-specific training, evaluations and authorization separately. [5]

8. How do we know a corrective action worked?

Ask for evidence suited to the issue: inspection results, testing, photographs, training records or observation of the task. Confirm that employees use the control and that the hazard has not simply moved elsewhere.

FREQUENTLY ASKED QUESTIONS

Making decisions and managing the transition

9. Does every safety finding need to delay closing?

No. Use the guide's three categories: before work starts, business decision, or after closing. A finding may require a work restriction even when leadership and advisors decide the transaction can proceed.

10. What must be addressed before affected work starts?

A serious safety issue or missing required protection that prevents the work from being done safely. A qualified reviewer should define the restriction, required control and restart criteria. Do not use the post-closing list to defer essential protections.

11. Can a temporary control allow work to continue?

Sometimes, if it adequately controls the hazard and meets applicable requirements. Assign an owner, communicate limits, verify the protection and set a deadline for the permanent solution. Stop or restrict work if protection is inadequate.

12. Does the buyer automatically inherit every prior obligation?

Do not assume that all obligations transfer, or that none do. Transaction structure, law, contracts and insurance all affect responsibility. Ask legal and insurance advisors to evaluate open citations, claims and potential exposures.

13. Can we request employee medical or claim files?

Begin with summaries or appropriately redacted information through the approved secure deal channel. Limit access, and request identifiable records only when needed and permitted, with legal and privacy guidance.

14. What should be ready on Day 1?

Emergency contacts, reporting instructions, responsible supervisors, stop-work and restart arrangements, required protections and verified task authorizations. Communicate equipment shutdowns, work restrictions and contractor responsibilities.

15. Who owns the follow-up after closing?

Assign one accountable owner to every material issue, supported by safety, operations, HR, finance, insurance or legal specialists as needed. Record the category, interim protection, due date and completion evidence in a shared tracker.

16. When should we bring in a specialist?

When the hazards, uncertainty or consequences exceed the team's expertise. Examples include chemical exposure, complex energy isolation, structural or electrical defects, serious incidents and unresolved regulatory matters.

REFERENCE

Sources and reference notes

Bracketed numbers identify supporting sources; entries marked + are additional review resources. Other entries explain common business usage and practical review concepts. Requirements vary by work, location and transaction; check current rules before acting.

#	Source	Web address
[1]	OSHA: Hazard Prevention and Control	https://www.osha.gov/safety-management/hazard-prevention
[2]	OSHA: General Industry Quick Start, Step 6	https://www.osha.gov/complianceassistance/quickstarts/general-industry
[3]	OSHA: Recordkeeping Forms	https://www.osha.gov/recordkeeping/forms
[4]	OSHA: Establishment-Specific Injury and Illness Data, Rate Calculation	https://www.osha.gov/itadata
[5]	OSHA: Outreach Training Program	https://www.osha.gov/training/outreach/
+	OSHA: Hazard Identification and Assessment	https://www.osha.gov/safety-management/hazard-identification
+	OSHA: Severe Injury Reporting	https://www.osha.gov/report

Reference pages reviewed November 5, 2026. This reference intentionally does not reproduce detailed reporting deadlines, exposure limits or industry-specific requirements; use the applicable official requirements and qualified advice for those decisions.

ABOUT THIS REFERENCE

A companion to the Workplace Safety Acquisition Guide, Version 1.0, November 2026; the decision categories and the three-to-five-year request period come from that guide. This is a general educational resource, not legal, regulatory, insurance, tax or medical advice, a compliance certification or a substitute for a site-specific assessment. Specialized or high-hazard operations require qualified review.