



Build Management Commitment – Gather Facts Checklist

Gather Your Facts: Documents needed to gather information regarding the current state of work compensation management at an organization.

A Level Documents: Essential

	Loss runs covering the last three years
	Experience mod worksheet for the last three years
	Most recent company profit margin

B Level Documents: Great To Have

	Account Handling Instructions
	Application for Employment
	Medical Treatment Form
	Employee Report of Incident Form
	Supervisor Report of Incident Form
	Witness Statement Form
	OSHA Logs covering the last three years
	Number of Lost Work Days
	Number of Employees Out of Work Right Now

C Level Documents: For Complete Company Analysis

	Medical Policy
	Absence / Leave Policy
	Information on employee benefits, vacation time, and pension
	Employee handbook
	Supervisor training manual
	Union contracts
	List of all company locations & divisions
	Organizational chart - Corporate
	Organizational charts – Local Divisions
	List of company attorneys
	Names and addresses of vendors
	Names and addresses of medical providers
	List of company employees by type and number