

The Supervisor's "Oh Sh*t" Checklist

What to do (and say) when you suspect someone is impaired, without freezing, getting punched, or making a costly mistake.

Why This Checklist Exists

You're a supervisor, not police, not a therapist, or a clinician. But the moment someone on your crew shows up "off," **you're legally on the hook.**

Make a misstep or stand still, and you run the risk of:

- A lawsuit
- Your name on a disciplinary report
- Damage to reputation or public and worker safety
- Something worse, a fatality

This checklist gives you **everything you need** to handle suspected impairment with confidence, clarity, and documentation that protects both you and the company.

5-Step Reasonable Cause Field Protocol

Use this checklist the moment you feel that "oh sh*t" in your gut. It's built to guide you - in real time - through your legal and safety obligations.

STEP 1: WHAT TO OBSERVE

Look for direct, observable signs of impairment. Not gossip. Not instinct. Not rumors.

Examples of valid observations:

- Bloodshot or glassy eyes
- Slurred or incoherent speech
- Unsteady walking or balance issues
- Smell of alcohol or cannabis
- Tremors, confusion, odd behaviour

Pro Tip: Build 2–3 minutes of light conversation into your daily routine (where possible). It helps you spot changes before they escalate. Ask Shift OHS about [Neurapulse](#).

STEP 2: CONFIRM

Ask another trained supervisor to observe the employee *without bias*.

Use this phrasing:

“Can you take a look at [Name]? I’m concerned they may not be fit for duty. Please observe and let me know what you think. Don’t lead or suggest anything.”

Why it matters:

This protects you from unconscious bias claims and supports the “reasonable person” legal standard.

STEP 3: WHAT TO DOCUMENT

Use a **Reasonable Cause Checklist** to record:

- Date, time, location
- Specific observations (appearance, behaviour, speech, odors)
- Names of witnesses or second observers
- Employee’s response or explanation

Pro Tip: Complete the documentation **before** the confrontation if possible. Your memory is sharpest right after observation.

STEP 4: WHAT TO SAY

Have the conversation **privately** and respectfully.

Use this simple script:

“Hi [Name], I noticed you seem a bit off today. I saw [insert specific behaviours] and I’m concerned for your safety. Can you help me understand what’s going on?”

Key Reminders:

- Don’t accuse — stick to what you observed
 - Stay calm, even if they get defensive
 - Listen respectfully, then follow company policy
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STEP 5: WHAT ACTION TO TAKE

If signs remain or their explanation isn’t reasonable, **take one of these actions immediately:**

Situation	Action
Employee agrees to testing	Escort them to the test facility. Never let them drive.

Situation	Action
You suspect a medical issue	Refer them for medical clearance.
They refuse testing	Document the refusal and alert HR/DER.
No clear signs remain	Still document and follow up with HR.

Remember: You're not judging or diagnosing. You're protecting your crew and fulfilling your duty.

Want The Supervisor's "Oh Sh*t" Checklist?

👉 See below for full **Reasonable Cause Checklist**.

📞 Or [Book Your Spot in The Reasonable Cause Supervisor Training](#) – before the next incident makes the decision for you.

Brought to you by Shift OHS

Helping companies recognize, respond, and recover from workplace impairment.

🌐 www.shiftohs.com | 📞 877-343-6869

Reasonable Cause Checklist:

PART 1: EMPLOYEE INFORMATION

Employee Name: _____

Employee Job
Title: _____

WorkSite _____

Observation Time (indicate a.m. or
p.m.) _____

Observation
Date: _____

PART 2: OBSERVATIONS (Place a checkmark next to any of the following observations)

Walking	☐ Holding on	☐ Stumbling	☐ Unable to walk
	☐ Unsteady	☐ Staggering	☐ Swaying
	☐ Falling		
Standing	☐ Swaying	☐ Feet wide apart	☐ Unable to stand
	☐ Rigid	☐ Staggering	☐ Sagging at knees
Movements	☐ Fumbling	☐ Jerky	☐ Nervous
	☐ Slow	☐ Hyperactive	
Speech	☐ Whispering	☐ Slurred	☐ Shouting
	☐ Incoherent	☐ Slobbering	☐ Silent
	☐ Rambling	☐ Mute	☐ Slow
Demeanor	☐ Cooperative	☐ Calm	☐ Talkative
	☐ Sarcastic	☐ Sleepy	☐ Polite
	☐ Crying	☐ Sleeping on job	☐ Argumentative
Actions	☐ Hostile	☐ Fighting	☐ Profanity
	☐ Drowsy	☐ Threatening	☐ Hyperactive
	☐ Erratic	☐ Calm	
Eyes	☐ Bloodshot	☐ Watery	☐ Droopy

	☐ Dilated	☐ Glassy	☐ Closed
Face	☐ Flushed	☐ Pale	☐ Sweaty
Breath	☐ No alcohol odor	☐ Faint alcohol odor	☐ Alcohol odor
	☐ Sweet/pungent tobacco odor		
Eating / Chewing	☐ Gum	☐ Candy	☐ Mints
Miscellaneous	☐ Presence of alcohol and/or drugs in employee's possession or vicinity ☐ On-the-job misconduct by employee ☐ Employee admission to alcohol and/or drug use or possession		

Other observations (if involved in accident, provide details):

Corroborating Witnesses (List names of all witnesses to the employee's conduct below):

PART 3: Employee's Response (the employee's explanation or reasons for his/her conduct)

PART 4: Action Plan

Once the above parts of this Reasonable Cause Checklist are completed by you and a witness, you can proceed to an action plan in a meeting with the employee.

Place a checkmark next to the applicable action(s):

- | | |
|---|---|
| ☐ Employee referred to D&A testing - AGREED | ☐ Employee referred to D&A testing - REFUSED |
| ☐ Employee referred to EAP or community resource | ☐ Employee referred for medical attention or medical clearance |
| ☐ Employee removed from safety-sensitive duties | ☐ No further action at this time. |

Supervisor Authentication

To the best of my knowledge and belief, this report represents the appearance, behaviour and/or conduct of the above-named employee, observed by me and upon which I base my decision indicated in the Action Plan section of this document.

_____ Supervisor Name (print)	_____ Supervisor Signature	_____ Date Signed
_____ Supervisor Name (print)	_____ Supervisor Signature	_____ Date Signed