

JOINT MINUTE TEMPLATE FOR ADULTS

Basics

Name of injured: _____

Date of birth: _____

Date of accident: _____

Preamble

Item	Issue	Industrial Psychologist's name:	Industrial Psychologist's name:
A	Do you see it as part of your job to obtain and or verify factual information?		
B	If your answer to (A) above is no, do you acknowledge that a calculation cannot be performed without someone else obtaining/verifying factual information?		
C	Do you consider yourself to be a remuneration expert?		
D	Do you consider yourself to be an expert on stating what type of career progression the injured party may have enjoyed both had the accident not occurred and now that the accident has occurred?		
E	Do you acknowledge that if your answer to (C) above was no, then you cannot express an opinion on likely earnings?		

Had the accident not occurred checklist

Item	Issue	Industrial Psychologist's name:	Industrial Psychologist's name:
1	Was the injured employed at the date of the accident?		
2	As at the date of the accident, please state the injured's employer (or whether the injured was self-employed), position and date that he/she commenced employment with the employer:		
3	Please provide a summary of earnings for the one year prior to the date of the accident. Please be careful to provide rand values for the <u>basic salary</u> ; and other benefits such as <u>annual bonuses</u> ; <u>overtime</u> ; <u>allowances</u> ; if the injured belonged to a <u>pension/provident fund</u> please state the exact name of the fund (refer to the Financial Service Board's registered active funds database in this regard available on www.fsb.co.za under the retirement funds section); if the injured belonged to a <u>medical aid scheme</u> please state the exact name of that scheme and whether the employer provided a medical aid subsidy; and any <u>other benefits</u> . If you have been provided with IRP5's please refer to the South African Revenue Service tax codes .		
4	If you have not been provided with proof of earnings whatsoever, please state as such:		
5	Did the injured's employer make use of a formal salary survey in setting earnings levels?		
6	Please provide the likely earnings progression of the injured had the accident not occurred. Before doing so, please answer the following questions:		
7(a)	Did you have a <u>documented</u> earnings history for the injured prior to the date of the accident and did the injured receive promotions historically?		
7(b)	Did you contact the employer to ascertain whether the injured would have been promoted? If so when would the promotion or promotions have taken place and what is the likelihood that the promotion(s) would have taken place? Was the injured specifically earmarked for promotion or would he/she have had to apply along with other candidates?		
7(c)	Did you contact the employer to ascertain what the injured's current earnings package would have been had the accident not occurred? Can you provide documentation confirming the current earnings package (for example, a pay-slip of an employee who was in a similar position to the injured)?		
8	Please map out the likely career progression of the injured for each career phase: <i>If making use of Paterson/Peromnes levels, please specify: (a) the money terms of the survey that you use; (b) whether basic salary, guaranteed package or total annual cost of employment must be used; (c) which quartile (lower quartile, median or upper quartile) or some other percentile must be used.</i>		
9	What would the normal retirement age of the injured have been? Did you obtain confirmation from the employer of the normal retirement age in writing or via the rules of the employer pension/provident fund?		

Now that the accident has occurred checklist

Item	Issue	Industrial Psychologist's name:	Industrial Psychologist's name:
1	Has the injured returned to work since the accident?		
2	When did the injured return to work and did he/she received full sick leave pay during his/her period of absence? Do you have documentary proof of same?		
3	Have you been provided with details of all earnings to date by way of IRP5's and pay-slips?		
4	Did you include this in your specification of information required from your instructing attorney?		
5	If the injured has been medically boarded, kindly indicate the exact date of medical boarding.		
6	Please indicate if the injured is in receipt of any disability benefits that have been paid from the injured's pension/provident fund and what the rand value of these benefits are. A copy of the rules governing the payment of any disability benefits must be obtained.		
7	Were you provided with any expert reports indicating a reduction in the injured's life expectancy? If so, please indicate what reduction was indicated.		
8	Did you ascertain if the injured is in receipt of a State Disability Grant?		
9	If the injured is still employed, please map out the likely career progression of the injured for each career phase: <i>If making use of Paterson/Peromnes levels, please specify: (a) the money terms of the survey that you use; (b) whether basic salary, guaranteed package or total annual cost of employment must be used; (c) which quartile (lower quartile, median or upper quartile) or some other percentile must be used.</i>		
10	What will the retirement age be now that the accident has occurred according to expert opinion? If the injured retires early, will any disability benefits be payable by the employer pension/provident fund?		