



Private Bag X14, Highveld Park, 0169

administered by  **Sanlam**

**APPLICATION FOR ILL HEALTH RETIREMENT IN TERMS OF
THE MUNICIPALITY GRATUITY FUND SECTION 35**

A

**MEDICAL INVESTIGATION
EMPLOYEE QUESTIONNAIRE**

Date	
Name and surname	
Identity Number	
Employee Number	
Employer	
Branch	
CONTACT DETAILS	
Physical Address	
Postal Address	
Cell Phone Number	
Telephone Number	
SKILLS AND QUALIFICATIONS	
Highest School Qualifications	
Highest Qualification Achieved	
Years Service	
Medical Aid	
Medical Aid Number	

Kindly answer the following questions fully, using the reverse side if necessary.

1. **Job Title**

2. **Under which classification would you categorise your job?**

Job Classification	Percentage Job Requirements per Day	Tick Where Applicable
Very light work	<ul style="list-style-type: none"> 80 – 100% Office bound No physical demands 	
Light work	<ul style="list-style-type: none"> 60 – 80% Office bound May work outside or in other places No or minimal physical demands 	
Medium work	<ul style="list-style-type: none"> 40 – 60% Office bound and rest of the time may include one or more of physical demands listed in the table below 	
Heavy work	<ul style="list-style-type: none"> 20 – 40% Office bound 60 – 80% Physical demands [see listed in the table below] 	
Very heavy work	<ul style="list-style-type: none"> 0 – 20% Office bound 80 – 100% Physical demands [see listed in the table below] 	
Physical Demands		Tick Where Applicable
Heavy lifting		
Walking over uneven ground		
Squatting		
Kneeling		
Crouching		
Climbing		
Any other activities involving comparable physical effort		

3. **Essential tasks**

Specific tasks that must be done by yourself and cannot be adjusted or re-allocated to other employees

Time spent on task

	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential

4. Environmental Condition Factor

Environmental Condition	Not present Exposure does not exist	Occasional Exposure exists up to 1/3 of time	Frequently Exposure exists 1/3 to 2/3 of time	Constantly Exposure exists 2/3 or more of time
Exposure to weather				
Extreme cold				
Extreme heat				
Wet and/or humid				
Noise				
Vibration				
Proximity to moving mechanical parts				
Exposure to electrical shock				
Working in high places				
Exposure to radiation				
Working with explosives				
Toxic or caustic chemicals				
Confined spaces				

5. Time spent during a normal work day [Walking + Standing + Sitting = 100% of one shift]:

➤ Walking	% of shift
➤ Standing	% of shift
➤ Sitting	% of shift
TOTAL	100% of shift

6. Describe Health and Safety risks associated with this job:

Physical [Noise, radiation]	
Ergonomic [Working posture, repetitive movements]	
Chemical [Hazardous chemical substances, vapours]	
Psychological [Extraordinary stress]	

7. Which of your tasks are you UNABLE to perform? If not, why not?

8. What was the date you were last actively at work?

Normal Job		Adjusted work	
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9. Disease or injuries that lead to this investigation.

10. Have your services ever been terminated or a medical disability claim lodged as a result of a medical condition? If yes, describe.
Yes
No

11. Please give us the following details of medical practitioners who examined you / treated you for the condition:			
	Name of doctor	Address	Telephone number
Usual family doctor			
Other medical practitioners			
Specialists			
Physiotherapists			
Occupational Therapists			

12. Are you presently undergoing medical treatment?
Yes
No
Specify illness and treatment:

13. Are you presently performing normal / adjusted work?
Yes
No

14. When do you expect to be able to resume your work:		
➤ Part-time and to what extent?	Date	
➤ Full-time?	Date	

15. If not capable to do your own work, what other occupations do you consider yourself capable of performing:		
15.1	Within your own company by reason of your training, education, experience and competence?	
15.2	In the open labour market, taking into account your training, education, experience and competence?	

16. In your opinion, has the employer made adequate attempts to accommodate you in an adjusted / alternative position? If yes, give details; if no, why are you of this opinion?	
Yes	
No	
Details	

WORK ABILITY QUESTIONNAIRE

Job Classification

Mainly manual work	
Roughly 50/50 manual and intellectual work	
Mainly intellectual work	

1.	Current work ability compared with the lifetime best										
	Assume that your work ability at its best has a value of 10 points. How many points would you give your current work ability? [0 = cannot work at all; 10 = the same as lifetime best ability to perform current work]										
0	1	2	3	4	5	6	7	8	9	10	
2a.	Work ability in relation to the demands of the job										
	How do you rate your current work ability with respect to the physical demands of your work?										
	Very good									5	
	Rather good									4	
	Moderate									3	
	Rather poor									2	
	Very poor									1	
2b.	How do you rate your current work ability with respect to the mental demands of your work?										
	Very good									5	
	Rather good									4	
	Moderate									3	
	Rather poor									2	
	Very poor									1	

3.	Current Diseases		
	In the following list, mark your injuries or illness. Also indicate whether a physician has diagnosed your illness or whether it is your own assessment / diagnosis.		
	CANCER	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	HEART OR BLOOD VESSEL DISEASE	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	BRAIN, NERVE OR MUSCLE DISEASE	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	LUNG DISEASE	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	JOINT OR SPINAL DISEASE	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	BLOOD OR BONE MARROW DISEASE	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	ABDOMINAL OR LIVER DISEASE	YES	NO
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>

	KIDNEY, BLADDER OR PROSTATE DISEASE	<i>YES</i>	<i>NO</i>
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	PSYCHIATRIC DISEASE	<i>YES</i>	<i>NO</i>
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	METABOLIC DISEASE [i.e. Diabetes, Thyroid, etc.]	<i>YES</i>	<i>NO</i>
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	EAR, NOSE & THROAT DISEASE	<i>YES</i>	<i>NO</i>
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	SKIN DISEASE	<i>YES</i>	<i>NO</i>
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	INJURIES	<i>YES</i>	<i>NO</i>
	Injury:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>
	OTHER DISEASES OF NOTE	<i>YES</i>	<i>NO</i>
	Disease:	<i>Physician's diagnosis</i>	<i>Own diagnosis</i>

4.	Estimated work impairment due to diseases
	Is your illness or injury a hindrance to your current job?
	There is no hindrance / I have no diseases
	I am able to do my job, but it causes some symptoms
	I must sometimes slow down my work pace or change my work methods
	I must often slow down my work pace or change my work methods
	Because of my disease, I feel I am able to do only part-time work
	In my opinion, I am entirely unable to work

5.	Sick leave during the past year [12 months]
	None at all
	At the most 9 days
	10 – 24 days
	25 – 99 days
	100 – 365 days
6.	Own prognosis of work ability two years from now
	Do you believe that, from the standpoint of your health, you will be able to do your current job two years from now ?
	Unlikely
	Not certain
	Relatively certain

7.	Mental resources	
a.	Have you recently been able to enjoy your regular daily activities?	
	Often	
	Rather often	
	Sometimes	
	Rather seldom	
	Never	
b.	Have you recently been active and alert?	
	Often	
	Rather often	
	Sometimes	
	Rather seldom	
	Never	
c.	Have you recently felt yourself to be full of hope for the future?	
	Continuously	
	Rather often	
	Sometimes	
	Rather seldom	
	Never	

DECLARATION

I solemnly and sincerely declare that the particulars given above, to the best of my knowledge and belief, true and correct.

Signature of Employee	
Date	

Consent for Disclosure of Confidential Information

I _____ Employee number _____ hereby grant my voluntary and informed consent to medical practitioners to disclose my medical and personnel records to the Medical Practitioners appointed by my employer to assess my medical incapacity.

I am also aware the all the medical information may be submitted to the responsible person appointed by my employer for making a final decision about my capacity to continue in my existing job.

This also includes my previous medical treatment as well as any psychological or psychiatric records, for the purpose of determining my ability to perform my work.

Thus done and signed at on this day of 20__ .

Signature:

Full names and surname:

Identity number:

Date:

MEMBER'S DECLARATION

PLEASE READ AND UNDERSTAND THE FOLLOWING DECLARATION CAREFULLY, BEFORE SIGNING AT THE PLACE PROVIDED FOR YOUR SIGNATURE

1. I acknowledge and understand that my duty to disclose all relevant information includes the disclosure of all and any information pertaining to my health and previous medical history to enable my application for ill health retirement to be properly assessed.	Initials
2. I declare and undertake that all the information and details I will furnish to my employer or any examining medical doctor/practitioner/specialist in supporting my application for ill health retirement will be true and accurate to the best of my knowledge. I declare and undertake that no medical or other information, which would reasonably be required by my employer or the MGF to consider and assess my application for ill health retirement, will be deliberately withheld, omitted or concealed.	Initials
3. I am aware that the false, inaccurate or incomplete information and/or detail supplied in support of my application for ill health retirement may in appropriate circumstances constitute fraud and the MGF reserves it's rights in terms thereof.	Initials
4. I hereby authorise the MGF, its employees and its Claims Assessor irrevocably to obtain any information that they, in their sole discretion might consider necessary in respect of my health and employment circumstances from any person who has such information available and I hereby indemnify anybody who, at the request of the above-mentioned supplies information, against any legal action whatsoever as a result of them supplying the information. I undertake to sign the necessary consents in this regard if required to do so.	Initials
5. I agree and consent to any necessary or appropriate medical or other investigations concerning the medical information or details and employment circumstances I will provide, or have already provided or which may be or become required. I am aware that the MGF, its employees or its Claims Assessor may require medical practitioners/specialists to undertake full medical examinations of me, and I confirm my willingness to co-operate and participate in any medical or related examinations which may be considered necessary.	Initials
6. I am aware that I am responsible for the payment of all medical costs relating to my disability assessment. This includes payment of the disability assessment conducted by Alexander Forbes Health Solutions and all costs relating to any additional/further medical test(s), examination(s) and/or investigation(s) which they may require to enable them to properly assess my application for Ill Health Retirement. I am aware of the fact that an amount equal to the agreed fee between the MGF and the claims assessor must accompany my application, when it is referred to the MGF Administrator and that should I fail to enclose the said amount in my application, my application will not be assessed.	Initials
7. I hereby authorise, consent to and instruct any doctor/hospital/clinic/institution/specialist/similar person/body, which is presently or may be in possession of (or may in future come into possession of) any information or knowledge concerning my past, present or future state of health, to disclose and make these available to my employer or the MGF, its employees or its Claim Assessor. I further declare that this authorisation, consent and instruction must remain valid before, as well as after, my death, should this occur.	Initials

8. I hereby indemnify my employer, the MGF, its employees, its claims assessor and any medical officer designated by them for medical examination purposes, against any claims flowing forth from any such medical examinations, reports and recommendations and the consequences thereof.
9. I hereby declare that I am not currently receiving any Ill Health retirement benefit from any institution. I further declare that my service has not previously been terminated with any other employer for any reason relating to my poor/ill health.
10. I hereby declare that I am satisfied that my employer has done everything that is reasonable to accommodate my medical impairment in their workplace, and that it has not been successful.

Initials

Initials

Initials

SIGNED ON THIS _____ **DAY OF** _____

AT _____

SIGNATURE

DATE

WITNESSES **1.** _____

2. _____



MUNICIPAL GRATUITY FUND

administered by  **Sanlam**

Private Bag X14, Highveld Park, 0169

**APPLICATION FOR ILL HEALTH RETIREMENT IN TERMS OF
THE MUNICIPALITY GRATUITY FUND SECTION 35**

B

**EMPLOYER DECLARATION
IN RESPECT OF A MEDICAL INVESTIGATION**

EMPLOYEE DETAILS

Full Name of Employee	
Employee Number	
Job Title [Current]	
ID Number	
Telephone Number	
Current Educational Level	
Other Courses Done	

EMPLOYER DETAILS

Name of Employer	
Address	
Telephone Number	
Fax Number	
Contact Person	

REASON FOR REFERRAL / APPLICATION

Permanent Disability Assessment <i>[I.e. services of employee to be terminated; application for disability benefits from a Policy / Pension Fund]</i>	
Work Capacity Investigation <i>[I.e. services of employee not terminated yet, but assessment for fitness for work for own / alternative job for accommodation purposes]</i>	
Other	

EMPLOYEE ATTENDANCE DETAILS

Date commenced employment with this company		
Last active day at work to all normal duties in current job		
Was the employee in full-time and normal employment on the last day at work?		
Date the employee returned to normal / adapted work? [If applicable]		
Date when employee will become unpaid		
Amount of sick leave days used in last 24 months		
Balance sick leave available	Date	
	Days	

GENERAL

Which aspects of his/her most recent job is the employee currently unable to do?

OCCUPATIONAL REQUIREMENTS OF JOB TO BE ASSESSED

Previous Job Title	
Present Job Title	
For which job must this person be assessed?	

Job Type [Job to be assessed]	
Job Type	Tick where applicable
Managerial; Supervision	
Professional; Technical; Clerical	
Hand Intensive	
Machine Operators	
Cleaners; Attendants	
Drivers	
Labourers; Material Handlers	
Mechanics; Installers; Repairers; Servicers	
Construction Workers	
Miscellaneous	

Under which classification would you categorise the job?

Job Classification	Percentage Job Requirements per Day	Tick Where Applicable
Very light work	<ul style="list-style-type: none"> 80 – 100% Office bound No physical demands 	
Light work	<ul style="list-style-type: none"> 60 – 80% Office bound May work outside or in other places No or minimal physical demands 	
Medium work	<ul style="list-style-type: none"> 40 – 60% Office bound and rest of the time may include one or more of physical demands listed in the table below 	
Heavy work	<ul style="list-style-type: none"> 20 – 40% Office bound 60 – 80% Physical demands [see listed in the table below] 	
Very heavy work	<ul style="list-style-type: none"> 0 – 20% Office bound 80 – 100% Physical demands [see listed in the table below] 	

Physical Demands	Tick Where Applicable to this Employee
Heavy lifting	
Walking over uneven ground	
Squatting	
Kneeling	
Crouching	
Climbing	
Any other activities involving comparable physical effort	

Essential tasks Specific tasks that must be done by him/herself and cannot be adjusted or re-allocated to other employees	Time spent on task		
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential
	Every shift	Once a week but essential	Seldom but essential

Environmental Condition Factor [To which employee is exposed to on a daily basis when performing his duties]				
Environmental Condition	Not present Exposure does not exist	Occasional Exposure exists up to 1/3 of time	Frequently Exposure exists 1/3 to 2/3 of time	Constantly Exposure exists 2/3 or more of time
Exposure to weather				
Extreme cold				
Extreme heat				
Wet and/or humid				
Noise				
Vibration				
Proximity to moving mechanical parts				
Exposure to potential electrical shock				
Working in high places				
Exposure to radiation				
Working with explosives				
Toxic or caustic chemicals				
Confined spaces				

Time spent during a normal work day [Walking + Standing + Sitting = 100% of one shift]:	
➤ Walking	% of shift
➤ Standing	% of shift
➤ Sitting	% of shift
TOTAL	100% of shift

Describe Health and Safety risks associated with this job:

Physical [Noise, radiation]	
Ergonomic [Working posture, repetitive movements]	
Chemical [Hazardous chemical substances, vapours]	
Psychological [Extraordinary stress]	

Is this person responsible for any evacuation of people / emergency operations [i.e. fire fighting, first aid]?

YES	
NO	
If yes, give details	

Attempts to accommodate employee

What efforts have you made to adapt the employee's work environment or duties to accommodate his/her impairment(s)? If no efforts at adaptations, please furnish reason.
What efforts have you made to accommodate the employee in an alternative position? If no efforts at accommodation, please furnish reason.

Please attach the following: <ul style="list-style-type: none">• Certified copy of original identity document• Fully completed job description form• Sick leave records covering the past two years, with copies of any sick leave certificates [if available]

Who does employee report to [if not same as signatory]?	
Name	
Title	
Contact details	

DECLARATION

Name of Signatory	
Designation	
E-Mail Address	
Cell Phone Number	
Signature	
Date	



Private Bag X14, Highveld Park, 0169

C

1. EMPLOYEE INFORMATION

PART 1: HOTEL INFORMATION					
Name					
Method of Identification	<i>ID Document</i>		<i>Drivers Licence</i>		<i>Other = specify</i>
Employee Nr					
Job Title					
ID Number					
Age					
Contact Details					
Consent for Disclosure signed?	Yes		No		

2. HISTORY

Narrative History Chief complaints, history of injury or illness, occupational history, past medical history, family history, social history
Main Complaints
Other Illness

3. MEDICAL EXAMINATION

Cardiovascular System				
• Height				
• Weight				
• Blood Pressure				
• Pulse Rate	/min	Regular	Irregular	
• Peripheral Oedema				
Respiratory System				
• Physical examination				
Abdomen				
• Physical examination				
Upper Extremities				
• General appearance	Left		Right	
• Neurological	Left		Right	
• Power	Left		Right	
• Handgrip	Left		Right	
• Reflexes	Left		Right	
• ROM	Left		Right	
• Dexterity	Left		Right	
Description of abnormalities Upper Extremities				
Lower Extremities				
• General appearance	Left		Right	
• Neurological	Left		Right	
• Power	Left		Right	
• Reflexes	Left		Right	
• ROM	Left		Right	
Description of abnormalities/ radiculopathy Lower Extremities				
Hip Joints	Left		Right	
Spine				
Straight Leg Raising	Left		Right	
Skin				
Ear, Nose and Throat				
Other Central Nervous System Pathology:				
Cognitive Performance:				

Mood and behaviour:

4. CAPACITY TO EXECUTE ACTIVITIES OF DAILY LIVING

Please tick where applicable

ACTIVITY	CURRENT LIMITATIONS				EXPECTED FUTURE ABILITY		
	No limitations	Partial limitations	Impossible	Danger to self or others	Improve	Remain constant	Deteriorate
Self-care, personal hygiene <i>Urinating, defecating, brushing teeth, combing hair, bathing, dressing oneself, eating</i>							
Communication <i>Writing, typing, seeing, hearing, speaking</i>							
Physical activity <i>Standing, sitting, reclining, walking, climbing stairs</i>							
Sensory function <i>Hearing, seeing, tactile feeling, tasting, smelling</i>							
Non-specialised hand activities <i>Grasping, lifting, tactile discrimination</i>							
Travel <i>Riding, driving, flying</i>							

5. CAPACITY TO EXECUTE INSTRUMENTAL ACTIVITIES OF DAILY LIVING

ACTIVITY	CURRENT LIMITATIONS			
	No limitations	Partial limitation	Impossible	Danger to self or others
Care of others (including selecting and supervising caregivers)				
Care of pets				
Child rearing				
Communication device use				
Community mobility				
Financial management				
Health management and maintenance				
Home establishment and maintenance				
Meal preparation and cleanup				
Safety procedures and emergency responses				
Shopping				

6. RECOMMENDATIONS ON FURTHER EXAMINATIONS OR DIAGNOSTIC STUDIES REQUIRED

Venue of Examination	
Name of Examiner	
Signature of Examiner	
Qualifications	
Date of Examination	