

## Instructing the Expert

### Initial Expert Report

- Clearly identified parties, including roles and relationships
- A summary/overview of the incident
- Date of injury / period of nature and conditions injury and deemed date of injury
- Assumptions (if required), which must be stated explicitly
- Clear instructions to provide a written Expert Report or preliminary conference only
- Questions required to be answered
- Instructions to undertake a site inspection, slip test or inspection of plant (if required)
- An itemised list of documents/evidence provided (copies provided in electronic form only). Including author, title and date
- Any upcoming dates which will affect the lead time including Court Orders/Schedule for filing dates and subpoena returns dates, a copy of the Court Orders/Schedule is required if scheduled in advance
- Clear instructions to provide a written Expert Report or preliminary conference only
- Contact details, including phone contact information to arrange an interview with the injured person
- Name of Counsel (if engaged)
- An instruction to comply with the applicable Expert Witness Code of Conduct and/or relevant Court Rules

### Supplementary Report

- Any changes to the parties, including roles/relationships
- Further or changed assumptions, which must be stated explicitly
- Clear instructions/questions required to be answered
- Details of other Expert Reports to be reviewed, including copies of all documents provided to the Expert in forming his/her opinion
- An itemised list of further documents/evidence provided (copies provided in electronic form only)
- Any upcoming dates which will affect the lead time including Court Orders/Schedule for filing dates and subpoena returns dates. A copy of the Court Orders/Schedule is required if scheduled in advance
- Any changes to the parties, including roles/relationships

### Joint Expert Witness Report/Conclave

- Letter of instruction prepared on behalf of all instructing solicitors jointly engaging the experts
- Conclave details, including details for an independent scribe if applicable
- Contact details of all Experts and instructing firms to forward a copy of the completed report
- Details of Expert Reports to be reviewed, including copies of all documents provided to the Expert in forming his/her opinion
- Clear instructions/questions to be addressed in the Conclave
- Assumptions, which must be stated explicitly
- An itemised list of documents/evidence to be considered by all Experts (copies provided in electronic form only)
- An instruction to comply with the applicable Expert Witness Code of Conduct and/or relevant Court Rules