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INSURANCE SECTOR EDUCATION
AND TRAINING AUTHORITY

INSETA

Occupational Qualifications Update

Johannesburg

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Updates

- **Latest updates from The Quality Council for Trades and Occupations (QCTO)**
- **Updates on Insurance sector related occupational qualifications**
- **Requirements for the implementation of occupational qualifications**
- **Occupational qualification accreditation processes with QCTO**
- **Questions and concerns**

Transitional arrangements – the road ahead to 2019 and beyond

Circular 1 of 2017 (QCTO) JAN 2018 &
CLARIFICATION MEMO JUNE 2018



- Establishing a **Single National Quality Assurance System** for all qualifications on the QQSF
- QCTO is responsible for QA of all occupational qualifications and part qualifications
- QCTO collaboration with and delegation of QA functions to QAPs for Historically Registered Qualifications (HRQs), Skills Programs and Implementation of Learnerships
- Qualifications with an end date of 30 June 2018 have been extended to allow more time for the registration of the replacement occupational qualifications
- Deregistration of historically registered qualifications will take effect when SAQA registers the replacement occupational qualification/s
- Insurance qualifications with high uptake were realigned and replaced with Occupational Qualifications
- QCTO is introducing a Final Summative Assessment (FISA) for all HRQs from November 2018 onwards with SETAs selected to partner to pilot

Transitional arrangements – the road ahead to 2019 and beyond

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Accreditation of Skills Development Providers:

- QCTO accredits SDPs for occupational qualifications – No SETA involvement
- Should an SDP require accreditation or extension of scope for historical/ current qualifications:
 - complete a **Letter of Intent** on QCTO website before applying to QAP
 - QCTO will acknowledge the letter of intent and upon approval allow application to QAP
 - QCTO may advise SDP to apply for a registered occupational qualification which replaces the occupational qualification
 - QAP processes accreditation and recommends QCTO accreditation/decline applicant.
 - Accreditation letter will be issued by the QCTO
 - QAP remains responsible for NLRD data submissions for HRQs

Transitional arrangements – the road ahead to 2019 and beyond

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Monitoring of Skills Development Providers:

- QCTO will collaborate with QAPs for monitoring of accredited SDPs for historically registered full qualifications
- Some monitoring visits will be conducted by a QAP monitor and QCTO monitor.
- QAP will submit monitoring visit reports to the QCTO\

Assessment of HRQs:

- QCTO will phase in Final Integrated Summative Assessments (FISA)
- Selection of QAPs for piloting of FISA

Certification Process:

- QAPs will continue to issue certificates for HRQs after learner achievements have been quality assured by the QCTO

HRQs REALIGNED TO OCCUPATIONAL QUALIFICATIONS

SAQA ID	Name of historical/ current qualification	Realigned Occupational Qualifications
66610 (LP 49929)	Further Education and Training Certificate: Short Term Insurance	Occupational Qualifications : NQF L4 Retail Insurance Sales ; NQF L4 Personal Lines Insurance Sales; NQF L5 Commercial Lines Insurance Sales NQF L6 Short Term Insurance Adviser NQF L4 Financial Services Administrator : Short Term
57918	National Certificate: Short Term Insurance	
66609 (49835)	Further Education and Training Certificate: Retail Insurance	

HRQs REALIGNED TO OCCUPATIONAL QUALIFICATIONS

SAQA ID	Name of historical/ current qualification	Realigned Occupational Qualifications
49649	Further Education and Training Certificate: Long-term Insurance	Occupational Qualifications: NQF L4 Long-Term Insurance Sales, NQF L4 : Health Care Benefit Insurance Sales NQF L4: NQF L4 Financial Services Administrator : Long Term NQF L4 Financial Services Administrator : Investment Products
66613 (57917)	Further Education and Training Certificate: Wealth Management	

HRQs REALIGNED TO OCCUPATIONAL QUALIFICATIONS

SAQA ID	Name of historical/ current qualification	Realigned Occupational Qualifications
57608 62809	National Certificate: Wealth Management Certificate: Financial Products	Occupational Qualifications: Financial Advisor NQF L5 Health Care Benefits Advisor; NQF L5 Employee and Pension Funds Benefit Advisor; NQF L6 Long Term Insurance Advisor; NQF L6 Investment Advisor
49356	Further Education and Training Certificate: Medical Claims Assessing	Occupational Certificate: Insurance Claims Assessor (includes context specific 50 credits workplace component for Short Term Insurance; Long Term Insurance; Statutory Insurance; Health Insurance Claims Assessor

ALIGNMENT OF INSURANCE QUALIFICATIONS – FINAL MODEL

1 SALES

332101 Insurance Agent

332101-001 Insurance Agent:
Short Term Insurance
Practitioner

PQ01: Retail Insurance
Representative NQF L4 CR59

PQ02: Commercial Lines
Insurance Representative NQF
L5 CR 188

PQ03: Personal Lines
Insurance Representative NQF
L4 CR 100

PQ04: Short Term Insurance
Advisor NQF L6 CR 362

332101-002 Insurance
Agent: Long Term Insurance
Practitioner

PQ01: Long Term Insurance
Representative NQF L4 CR93

PQ02: Health Care Benefit
Insurance Sales NQF L 4 CR 90

241301-001
Financial and Investment
Advisor: Financial Advisor

PQ01: Long Term Insurance
Advisor

PQ01: Pensions and Employee
Benefit Advisor

PQ01: Health Care Advisor

PQ01: Investment Advisor

2 ADMINISTRATION

431201002
Financial Services
Administrator

PQ01: SHORT TERM
NQF L4 CR 45

PQ02: LONG TERM
NQF L4 CR 41

PQ03: INVESTMENT
PRODUCTS
ADMINISTRATOR
NQF L4 CR 50

PQ04: INSURANCE
PROTEGEE NQF L4
CR 76 (TVET)

3 CLAIMS

431204001
Claims Assessor

PQ01: Statutory

PQ 02: Short Term

PQ03: Long Term

PQ04: Medical

4 RISK MANAGEMENT and UNDERWRITING

242208004
Risk Officer

242208002 Risk
Practitioner

332101001
Insurance Underwriter

5 COMPLIANCE

242207000
Compliance Officer



Updates on Insurance sector related occupational qualifications



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- Sales and Admin Occupational Qualifications from realignment project submitted to QCTO for approval
- Anticipated SAQA registration by end of 2018 for first set of realigned occupational qualifications
- INSETA planned project for materials development
- Underwriter RPL pilot project – Aug to Dec 2018
- Underwriter and Vehicle Damage Quantifier Occupational Qualifications registered as learnerships
- Claims awaiting DHET registration as a learnership

FOUR PROCESSES

Establish the AQP (Examining Body)

Nominated by
Constituency

Accepts
Nomination

Appointed
by QCTO

Develop
Assessment
Tools

Establish
Policies and
Procedures

6 Months

Enable delivery

Delivery
Strategy:
Learning
Curriculum
Design

Development of
learning material
and formative
assessment tools

QCTO
Accreditation
of providers

Funding
vehicles:
Learnerships/
Bursaries/ Self
funding

Requirements for the implementation of occupational qualifications

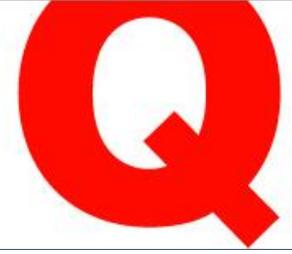
- Clear commitment to developing occupational competence and workable skills
- Expertise in the occupation and a clear understanding of the demands of the job
- Integration of knowledge, practical and workplace modules in a manner that makes sense for the progression of the learner
- Ability to understand occupational curricula and unpack delivery models

SDP requirements for the implementation of occupational qualifications



- Learning Curriculum Design – how do you plan to roll out the qualification modules?
- Check that the sequencing makes sense with an experienced practitioner in the occupation
- Check learning content for currency and applicability to work context
- Are your facilitators experienced subject matter experts?
- Induction for mentors and clear understanding of the workplace requirements
- System for monitoring learner progress
- QCTO enrolment requirements – SAQA NLRD uploads are done by the QCTO for occupational qualifications

Accreditation process for occupational qualifications



Phase 1 – Desktop Evaluation

- Proof of Juristic status
- Valid Tax Clearance Certificate/ or evidence of exemption
- Proof of financial sustainability for the learning services applied for
- Valid OHS Certificate
- Evidence of appropriately qualified facilitators
- Learner Appeals Policy and Code of Conduct

Phase 2 – Site Visit (Programme Delivery readiness)

- Site visit date is confirmed with SDP
- Site visit is conducted by a QCTO Verifier

Accreditation outcome

Verification outcome is finalised by QCTO and the accreditation outcome is issued to the SDP

applies to QCTO for accreditation

Changes to QCTO Occupational qualification accreditation application forms



- The accreditation process comprises of two parts namely: institutional compliance and programme delivery readiness.
- Application for SDP Accreditation
 - Institutional requirements and summary
- Form 1
 - Implementation plan/program delivery strategy -
- Form 2
 - Learning Materials Matrix
- Form 3
 - Learning matters
- Form 4
 - Signed declaration

QCTO Accreditation Documents

1. Completed Implementation Plan

2. Comprehensive CVs of facilitators and certified copies of ID and qualifications as per curriculum specifications.

3. Learner Matters (Learner Information Guide, i.e. processes from Enrolment to Certification)

4. Learning Material Matrix

5. Signed Memorandum of Understanding (MoU) for the implementation of the workplace component, indicating clear deliverables for learners

6. Learner prospectus and marketing materials

7. Policies relating to:

- Teaching and learning**
- Assessments**
- Appeals**

PLANNING FOR THE FUTURE

What do you need to do to remain sustainable from 2019 and beyond?



QUESTIONS



THANK YOU