Quality Council for Trades & Occupations
www.qcto.org.za
256 Glyn Street, Hatfield, Pretoria, 0083
Private Bag X278, Pretoria, 0001
+27 12 003 1800

OCCUPATIONAL QUALIFICATION/PART-QUALIFICATION/ SKILLS PROGRAMME
CURRICULUM DOCUMENT TEMPLATE
IN LINE WITH THE OQSF POLICY (2021) OCCUPATIONAL QUALIFICATION TYPE (NOMENCLATURE)

QUALIFICATION/PART-QUALIFICATION/SKILLS PROGRAMME	TYPE (NOMENCLATURE)	TITLE (DESCRIPTOR)	NQF LEVEL	CREDITS
Qualification	National Occupational Certificate	Insurance Administrator	4	120
CURRICULUM CODE	431204-002-00-00			
PARTNER DETAILS	**ORGANISATION NAME**	**WEBSITE ADDRESS**	**TELEPHONE NUMBER**	**LOGO**
QUALITY PARTNER - DEVELOPMENT	Insurance Sector Education and Training Authority (INSETA)	www.inseta.org.za	0113818900	
QUALITY PARTNER – ASSESSMENT (NOT APPLICABLE FOR SKILLS PROGRAMME)	Insurance Sector Education and Training Authority (INSETA)	www.inseta.org.za	0113818900	

DESIGNATION	NAME AND SURNAME	SIGNATURE	DATE
SUBJECT MATTER EXPERT (SME)	Dr Yolande Hagedorn-Hansen		...
QUALITY PARTNER REPRESENTATIVE	Mr Sibusiso Zulu		...

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SECTION 1: CURRICULUM SUMMARY

1.1 Occupational Information:

1.1.1 Associated, Organising Framework for Occupations (OFO) Occupational Code and Title

431204-002-00-00: Insurance Administrator

1.1.2 Occupation/Specialisation/Part-Qualification/Skills Programme Type, Title, NQF Level, Credits and Curriculum Code, addressed by this Curriculum.

TYPE	TITLE	NQF LEVEL	CREDITS	CURRICULUM CODE
National Occupational Certificate	Insurance Administrator	4	120	431204-002-00-00

1.1.3 Alternative titles used by industry:

Insurance Operations Administrator

Insurance Administrator Assistant

Insurance Administration Officer

Policy Administrator

Policy Administration Clerk

Client Services Administrator

1.2 Curriculum Information:

1.2.1 Articulation for Qualifications

(a) Horizontal Articulation

Between sub-frameworks –

• National Certificate: Vocational, Level 4 (SAQA ID 50441), through Learning Programme 90804: National Certificate: Vocational: Finance, Economics and Accounting, NQF Level 4.

This is a potential horizontal articulation pathway between the GFETQSF and the OQSF. Admission, subject prerequisites, recognition of prior learning and any credit transfer remain subject to the receiving institution's admission and credit-recognition policies. Completion of this qualification does not confer automatic admission or credit towards the Insurance Administrator qualification, or vice versa.

Within the OQSF –

No currently registered OQSF qualification has been identified as a sufficiently aligned horizontal articulation destination for the Insurance Administrator qualification. The National Occupational

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Certificate: Micro-Finance Loan Consultant (SAQA ID 125123, NQF Level 4) is not listed as a formal articulation destination because its principal occupational focus is micro-lending, loan origination, loan-portfolio administration and collections. Shared finance or administrative content alone does not establish equivalence or an appropriate articulation pathway.

(b) Vertical Articulation

Potential progression within the OQSF –

• Occupational Certificate: Insurance Practitioner, NQF Level 5, Curriculum Code 431204-003-00-00 (proposed qualification within the INSETA suite; subject to QCTO approval and registration).

• Occupational Certificate: Financial Services Practitioner, NQF Level 5, Curriculum Code 332101-002-00-00 (proposed qualification within the INSETA suite; subject to QCTO approval and registration).

The above are proposed progression pathways and are not represented as currently registered articulation destinations. They may be confirmed as formal articulation destinations only once the relevant qualifications have been approved and registered. Admission, credit recognition and any additional learning requirements will be determined by the receiving institution in accordance with the registered qualification requirements and applicable policies.

(c) Diagonal Articulation

No diagonal articulation destination is confirmed for this qualification at the time of this curriculum submission. Diagonal articulation possibilities may be added in a future review where a currently registered destination qualification has been identified and the relationship between the qualifications, NQF levels, sub-frameworks, learning outcomes and admission requirements has been verified.

1.2.2 Validation of Entry Requirements into Articulation Possibilities Provided

YES – The entry requirements and NQF level of the identified National Certificate: Vocational, Level 4 pathway have been reviewed at curriculum development stage. The proposed NQF Level 5 progression pathways are subject to approval and registration; their entry requirements must be revalidated once the final registered qualification documents are available. Admission, credit transfer and recognition of prior learning remain subject to the receiving institution's requirements and policies.

1.2.3 Articulation for Skills programmes

(a) Work Opportunities: Not applicable – this curriculum is for a qualification and not a skills programme.

(b) Learning Opportunities: Not applicable – this curriculum is for a qualification and not a skills programme.

1.3 Curriculum structure:

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1.3.1 Knowledge/Theory Modules:

- 431204-002-00-KM-01 Introduction to the insurance industry, NQF Level 4, Credits 6
- 431204-002-00-KM-02 Insurance products, services and claims administration, NQF Level 4, Credits 8
- 431204-002-00-KM-03 Policy administration and underwriting support, NQF Level 4, Credits 8
- 431204-002-00-KM-04 Premium administration, NQF Level 4, Credits 6
- 431204-002-00-KM-05 Regulatory and compliance framework in insurance, NQF Level 4, Credits 8
- 431204-002-00-KM-06 Digital tools and technology in insurance administration, NQF Level 4, Credits 4

Total number of credits: 40

1.3.2 Practical Skills Modules:

- 431204-002-00-PM-01 Administer policies and support underwriting administration, NQF Level 4, Credits 5
- 431204-002-00-PM-02 Deliver customer service, NQF Level 4, Credits 5
- 431204-002-00-PM-03 Perform premium administration duties, NQF Level 4, Credits 5
- 431204-002-00-PM-04 Perform regulatory and compliance support activities, NQF Level 4, Credits 5
- 431204-002-00-PM-05 Utilise digital tools and technology in insurance administration, NQF Level 4, Credits 5
- 431204-002-00-PM-06 Provide claims administration support, NQF Level 4, Credits 5

Total number of credits: 30

1.3.3 Work Experience Modules:

- 431204-002-00-WM-01 Insurance Industry Operations and Underwriting Administration Support Processes, NQF Level 4, Credits 5
- 431204-002-00-WM-02 Process Insurance Products and Service Support, NQF Level 4, Credits 10
- 431204-002-00-WM-03 Policy Administration and Underwriting Support Processes, NQF Level 4, Credits 10
- 431204-002-00-WM-04 Premium Administration Processes – NQF Level 4, Credits 5
- 431204-002-00-WM-05 Regulatory and Compliance Support Processes, NQF Level 4, Credits 5
- 431204-002-00-WM-06 Digital Systems and Technology in Insurance Administration, NQF Level 4, Credits 5
- 431204-002-00-WM-07 Claims Administration Processes, NQF Level 4, Credits 10

Total number of credits: 50

1.4 Entry Requirements:

NQF Level 3 qualification

1.5 Recognition of Prior Learning (RPL):

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1.5.1 RPL for Access to Training/Exemption:

Learners may use the RPL process to gain access to training opportunities for a qualification, if they do not meet the formal, minimum entry requirements for admission. RPL assessment provides an alternative access route into a qualification.

Such an RPL assessment may be developed, moderated, and conducted by the accredited Skills Development Provider which offers that specific qualification. Such an assessment must ensure that the learner is able to display the equivalent level of competencies required for access, based on the NQF level descriptors.

For exemption from modules through RPL, learners who have gained the stipulated competencies of the modules of a qualification through any means of formal, informal, or non-formal learning and/or work experience, may be awarded credits towards relevant modules, and gaps identified for training, which is then concluded.

1.5.2 RPL for Access to the External Integrated Summative Assessment (EISA):

Learners who have gained the stipulated competencies of the modules of a qualification through any means of formal, informal, or non-formal learning and/or work experience, may be awarded credits towards relevant modules, and gaps identified for training, which is then concluded.

A valid Statement of Results is required for admission to the EISA in which confirmation of achievement is provided that all internal assessment criteria for all modules in the related curriculum document have been achieved.

Upon successful completion of the EISA, RPL learners will be issued with the QCTO certificate for the qualification. Quality Partners are responsible for ensuring the RPL mechanism and process for qualifications is approved by the QCTO.

1.6 Quality Partner for Assessment:

NAME OF BODY:	Insurance Sector Education Training Authority
ADDRESS OF BODY:	18 Fricke Rd, Illovo, Sandton, 2196
WEBSITE:	www.inseta.org.za
TELEPHONE NUMBER:	011 381 8900

1.7 List of Qualification(s)/Part- Qualification(s)/Skills Programme(s) Related to this Curriculum

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None

SECTION 2: OCCUPATIONAL QUALIFICATION PROFILE

2.1 Purpose:

The purpose of this qualification is to prepare a learner to function as an Insurance Administrator.

An Insurance Administrator supports insurance operations through the application of fundamental insurance principles, policy structures, administrative processes, regulatory requirements, and digital systems. The work includes the administration of client and policy information, insurance documentation, premium and claims administration, compliance and operational requirements and communication with clients, insurers, service providers, and other stakeholders.

2.2 Tasks:

TASKS	LINKS TO ELO
Task 1: Administer policies and support underwriting administration	ELO 1: Apply policy administration procedures and support underwriting administration activities in accordance with organisational procedures and insurance operational requirements
Task 2: Deliver customer service and communication with stakeholders	ELO 2: Apply customer service principles and communication practices to effectively interact with policyholders, intermediaries and other stakeholders.
Task 3: Provide claims administration support	ELO 3: Apply claims administration support procedures to facilitate the accurate processing and administration of insurance claims.
Task 4: Perform compliance and operational support activities	ELO 4: Apply regulatory, compliance and operational support requirements within an insurance administration environment.
Task 5: Utilise digital systems and perform financial administration activities	ELO 5: Utilise digital systems and perform financial administration activities to support insurance operations and maintain accurate organisational records.

2.3 Occupational Task Details:

2.3.1 Task 1: Administer policies and support underwriting administration

(a) Unique Product or Service:

- Accurate and compliant policy administration and underwriting support services.

(b) Responsibilities:

- Process new business applications, policy renewals, endorsements and cancellations.

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- Capture, verify and maintain accurate client and policy information.
- Prepare, issue and maintain policy documentation and records using manual and digital systems.
- Support underwriting administration activities by collecting and processing required information and documentation.
- Apply organisational procedures, service standards and regulatory requirements during policy administration activities.
- Escalate incomplete, irregular or non-standard information in accordance with organisational procedures.

(c) Contexts:

These processes are performed within insurance operational environments under supervision and in accordance with organisational procedures, underwriting guidelines, compliance requirements and service standards. The processes relate to policy administration and underwriting administration, including the processing and maintenance of policy and client information, policy documentation and records, and supporting the processing of required underwriting information and documentation. Work is conducted using insurance administration systems, digital platforms and organisational recordkeeping processes.

Task 2: Deliver customer service and communication with stakeholders

(a) Unique Product or Service:

Professional, customer-centred service and communication support that ensures efficient insurance support through verbal, written and digital interactions.

(b) Responsibilities:

- Respond to routine client enquiries relating to insurance products, policies and claims processes.
- Communicate effectively with clients, intermediaries and internal departments.
- Prepare and maintain correspondence and communication records.
- Handle routine complaints and escalate complex matters in accordance with organisational procedures.
- Provide customer service support in accordance with organisational service standards and ethical requirements.
- Maintain professional and customer-focused interactions within insurance operational environments.

(c) Contexts:

These processes are performed within client service and insurance operational environments under supervision and in accordance with organisational procedures, service standards, confidentiality requirements and ethical requirements. The processes relate to customer service and stakeholder communication, including responding to routine enquiries, communicating with clients, intermediaries and internal departments, managing routine complaints and maintaining correspondence and communication records. Work is conducted using approved communication channels and organisational systems while maintaining confidentiality and professionalism.

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Task 3: Provide claims administration support

(a) Unique Product or Service:

Accurate and compliant claims administration support services.

(b) Responsibilities:

- Register and process insurance claims in accordance with organisational procedures.
- Collect, verify and maintain claims-related documentation and records.
- Capture and update claims information on insurance administration systems.
- Communicate claims requirements and progress to clients and stakeholders.
- Support claims administration processes by maintaining records, processing documentation and facilitating communication in accordance with organisational procedures.
- Maintain accurate claims records in accordance with organisational and regulatory requirements.

(c) Contexts:

These processes are performed within insurance claims administration environments under supervision and in accordance with claims procedures, organisational requirements, compliance obligations and customer service standards. The processes relate to claims registration and processing, claims documentation and recordkeeping, claims information management, and communication with clients and stakeholders regarding claims requirements and progress. Work is conducted using insurance administration systems, digital platforms and organisational recordkeeping processes.

Task 4: Perform compliance and operational support activities

(a) Unique Product or Service:

Compliant insurance operational administration, risk awareness and recordkeeping support services.

(b) Responsibilities:

- Apply organisational policies, procedures and regulatory requirements within insurance operations.
- Maintain confidentiality and secure handling of customer information.
- Identify, record and report irregularities, errors or suspicious activities or potential risk indicators in accordance with organisational procedures
- Maintain records and administrative documentation.
- Support risk control and compliance and operational reporting activities.
- Provide general operational and administrative support within insurance workplace environments.

(c) Contexts:

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These processes are performed within regulated insurance operational environments under supervision and in accordance with organisational procedures, compliance obligations, ethical standards, recordkeeping requirements and workplace protocols. The processes relate to compliance administration, risk identification and reporting, information confidentiality and security, operational recordkeeping, and compliance and operational reporting. Work is conducted using organisational systems and established administrative and recordkeeping processes.

Task 5: Utilise digital systems and perform financial administration activities

(a) Unique Product or Service:

Accurate digital insurance administration and financial processing support services.

(b) Responsibilities:

- Use insurance administration systems to perform operational and administrative tasks.
- Maintain and update electronic information using insurance administration systems.
- Process premium-related transactions and basic financial administration activities.
- Generate or extract routine operational, financial and administrative reports using organisational systems.
- Support digital workflow and automated administration processes.
- Apply organisational cybersecurity, information security and data protection requirements when using digital systems and electronic information.
- Apply organisational procedures when using digital insurance technologies and systems.

(c) Contexts:

These processes are performed within insurance operational environments under supervision and in accordance with organisational procedures, information security and data protection requirements, financial controls and reporting requirements. The processes relate to digital insurance administration, electronic information management, premium-related financial processing, operational and financial reporting, and digital workflow and automated administration. Work is conducted using insurance administration systems, digital communication tools, financial processing systems and organisational reporting platforms.

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SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS

3.1 Knowledge Module Specifications:

NB: MODE OF DELIVERY e.g. face-to-face/contact, online, e-learning, mobile training unit, blended, distance, etc

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-01	Introduction to the insurance industry	4	6	Face to face or online or blended
431204-002-00-KM-02	Insurance products, services and claims administration	4	8	Face to face or online or blended
431204-002-00-KM-03	Policy administration and underwriting support	4	8	Face to face or online or blended
431204-002-00-KM-04	Premium administration	4	6	Face to face or online or blended
431204-002-00-KM-05	Regulatory and compliance framework in insurance	4	8	Face to face or online or blended
431204-002-00-KM-06	Digital tools and technology in insurance administration	4	4	Face to face or online or blended

3.1.1 Detailing Knowledge Module (KM) contents

Knowledge Module (KM) - 01

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-01	Introduction to the insurance industry	4	6	Face to face or online or blended

(a) Purpose of Knowledge Module:

The main focus of the learning in this knowledge module is to build an understanding of the insurance industry, the insurance value chain, the role of insurance administration, and the principles of professional conduct required to operate effectively within an insurance environment.

The learning will enable learners to demonstrate an understanding of the topics listed below:

(b) List of Knowledge Topics:

TOPIC CODE	TOPIC TITLE	% OF TIME TO BE SPENT
KM-01-KT01	Evolution and purpose of insurance and risk management	35%
KM-01-KT02	Structure of the insurance industry	15%

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KM-01-KT03	Insurance administration and the value chain	20%
KM-01-KT04	Professional conduct and career awareness in insurance	30%

(c) Detailing each topic listed above into topic elements:

KM-01-KT01…EVOLUTION AND PURPOSE OF INSURANCE AND RISK MANAGEMENT 35%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0101	History and evolution of the insurance industry	50%
KT0102	Role and purpose of insurance and risk management in society and the economy	50%

(d) Internal Assessment Criteria (IAC) and Weight

IAC CODE	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0101	Explains the history and evolution of the insurance industry	30%
IAC0102	Describes the role and purpose of insurance and risk management in context of society and the economy	70%

(c) Detailing each topic listed above into topic elements:

KM-01-KT02… STRUCTURE OF THE INSURANCE INDUSTRY 15%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0201	Types and functions of insurers, intermediaries, UMAs and other service providers	100%

(d) Internal Assessment Criteria (IAC) and Weight

IAC0201	Describes different types of insurance providers and intermediaries and their functions	100%

(c) Detailing each topic listed above into topic elements:

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KM-01-KT03… INSURANCE ADMINISTRATION AND THE VALUE CHAIN 20%		
KT0301	Broad orientation to the administrator's role in the value chain	100%

(d) Internal Assessment Criteria (IAC) and Weight

IAC0301	Describes the role. key responsibilities and contribution of an insurance administrator within the insurance value chain	100%

(c) Detailing each topic listed above into topic elements:

KM-01-KT04… CAREERS, ETHICS, AND PROFESSIONAL CONDUCT IN INSURANCE 30%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0401	Occupational roles, responsibilities and career pathways within the insurance industry	20%
KT0402	Ethical principles, professional conduct and organisational values in insurance administration	80%

(d) Internal Assessment Criteria (IAC) and Weight

IAC0401	Describes the importance of ethical conduct and professionalism within the insurance industry	75%
IAC0402	Identifies occupational roles and progression opportunities within insurance environments	25%

Knowledge Module (KM) - 02

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-02	Insurance products, services and claims administration	4	8	Face to face or online or blended

(a) Purpose of Knowledge Module:

The main focus of the learning in this knowledge module is to build an understanding of insurance products and services, including types of insurance, policy structures, risk transfer principles, basic underwriting concepts, the insurance product lifecycle and claims

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administration, thereby enabling effective administrative support within the insurance environment

The learning will enable learners to demonstrate an understanding of the topics listed below:

(b) List of Knowledge Topics:

The learning will enable learners to explain:

TOPIC CODE	TOPIC TITLE	% OF TIME TO BE SPENT
KM-02-KT01	Types of insurance products	20%
KM-02-KT02	Structure and components of insurance policies	20%
KM-02-KT03	Basic insurance risk principles and categories	20%
KM-02-KT04	Underwriting outcomes and their administrative implications	20%
KM-02-KT05	Insurance product lifecycle and overview of claims administration	20%

(c) Detailing each topic listed above into topic elements:

2. KM-02-KT01 TYPES OF INSURANCE PRODUCTS 20%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0101	Types of insurance	100%

(d) Internal Assessment Criteria (IAC) and Weight – overall weighting 20%

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0101	Distinguish between types of insurance (life, non-life, personal, commercial, health)	100%

(c) Detailing each topic listed above into topic elements:

2. KM-02-KT02 STRUCTURE AND COMPONENTS OF INSURANCE POLICIES 20%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0201	Common structure of insurance policies	20%
KT0202	Policy schedules and wordings	20%
KT0203	Policy terms and conditions	20%
KT0204	Extensions and endorsements	20%
KT0205	Exclusions and limitations	20%

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(d) Internal Assessment Criteria (IAC) and Weight – overall weighting 20%

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0201	Explains the structure and components of insurance policies, including schedules wordings, terms, conditions, extensions endorsements, exclusions and limitations	100%

(c) Detailing each topic listed above into topic elements:

2. KM-02-KT03 BASIC INSURANCE RISK PRINCIPLES AND CATEGORIES 20%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0301	Concept of risk in insurance	25%
KT0302	Risk transfer through insurance	25%
KT0303	Principles of insurable interest	25%
KT0304	Principle of indemnity and its application	25%

(d) Internal Assessment Criteria (IAC) and Weight – overall weighting 20%

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0301	Explains the concepts of risk, risk transfer, insurable interest and indemnity in insurance	100%

(c) Detailing each topic listed above into topic elements:

2. KM-02-KT04. UNDERWRITING OUTCOMES AND THEIR ADMINISTRATIVE IMPLICATIONS 20%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0401	Purpose of underwriting	25%
KT0402	Basic underwriting principles	25%
KT0403	Information considered in basic underwriting processes	25%
KT0404	Administrative implications of underwriting decisions	25%

(d) Internal Assessment Criteria (IAC) and Weight – overall weighting 20%

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT

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IAC0401	Describes common underwriting outcomes and the associated administrative actions	100%

(c) Detailing each topic listed above into topic elements:

2. KM-02-KT05. INSURANCE PRODUCT LIFECYCLE AND OVERVIEW OF CLAIMS ADMINISTRATION 20%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0501	Stages of the insurance product lifecycle	20%
KT0502	Product development and approval overview	20%
KT0503	Ongoing policy administration requirements	20%
KT0504	Product review, amendments and withdrawal at different lifecycle stages	20%
KT0505	Claims administration support	20%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0501	Describes the stages of the insurance product lifecycle and the administrative implications of product development, review, amendment and withdrawal	100%

Knowledge Module (KM) - 03

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-03	Policy administration and underwriting support	4	8	Face to face or online or blended

(a) Purpose of Knowledge Module:

The main focus of the learning in this knowledge module is to build an understanding of policy administration processes and insurance documentation, including policy issuance, amendments, record-keeping, communication and document control, enabling effective insurance administration within regulatory and organisational requirements.

The learning will enable learners to demonstrate an understanding of the topics listed below:

(b) List of Knowledge Topics:

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The learning will enable learners to explain:

TOPIC CODE	TOPIC TITLE	% OF TIME TO BE SPENT
KM-03-KT01	Policy documentation and policy records	25%
KM-03-KT02	Policy administration processes	25%
KM-03-KT03	Underwriting support and policy processing	25%
KM-03-KT04	Document control, filing, and record management	25%

(c) Detailing each topic listed above into topic elements:

3. KM-03-KT01 POLICY DOCUMENTATION AND POLICY RECORDS 25%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0101	Purpose and importance of insurance policy documentation	20%
KT0102	Types of policy documents (policy schedule, wording, endorsements)	30%
KT0103	Standard information contained in policy documents	30%
KT0104	Accuracy and completeness requirements in policy records	20%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0101	Explain the purpose and importance of insurance policy documentation	20%
IAC0102	Identify and describe different types of insurance policy documents	20%
IAC0103	Explain common information contained in policy schedules and wordings and the importance of accuracy and completeness in policy records.	30%
IAC0104	Explain the requirements for providing underwriting support through information, documentation and appropriate referral	30%

(c) Detailing each topic listed above into topic elements:

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3. KM-03-KT02 POLICY ADMINISTRATION PROCESSES 25%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0201	Policy administration lifecycle and workflow	25%
KT0202	Policy inception and issuance processes	25%
KT0203	Ongoing policy servicing activities	25%
KT0204	Administrative roles and responsibilities within policy administration	25%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0201	Explain the role and scope of policy administration within insurance	25%
IAC0202	Describe policy inception and issuance processes	25%
IAC0203	Explain ongoing policy servicing activities	25%
IAC0204	Describe the roles and responsibilities of insurance administrators within policy administration processes	25%

(c) Detailing each topic listed above into topic elements:

KM-03-KT03 UNDERWRITING SUPPORT AND POLICY PROCESSING 25%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0301	Types of policy changes and endorsements	20%
KT0302	Documentation requirements for amendments	20%
KT0303	Renewal processes and timelines	20%
KT0304	Purpose and role of underwriting support	20%
KT0305	Information, documentation and referral requirements for underwriting support	20%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT

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IAC0301	Distinguish between different types of policy changes	25%
IAC0302	Explain endorsement and amendment documentation requirements	25%
IAC0303	Describe the policy renewal process	25%
IAC0304	Explains the information and documentation requirements for routine underwriting administration, including the identification and referral of incomplete, inconsistent or non-standard information	25%

(c) Detailing each topic listed above into topic elements:

KM-03-KT04 DOCUMENT CONTROL, FILING AND RECORD MANAGEMENT 25%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0401	Document control principles	25%
KT0402	Filing and indexing systems	25%
KT0403	Record retention, archiving and disposal requirements	25%
KT0404	Confidentiality and data protection considerations	25%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0401	Explains document control principles in insurance administration	25%
IAC0402	Describes filing and record management systems used in insurance	25%
IAC0403	Explains record retention and archiving requirements	25%
IAC0404	Describes confidentiality and data protection responsibilities	25%

Knowledge Module (KM) - 04

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-04	Premium administration	4	6	Face to face or online or blended

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(a) Purpose of Knowledge Module:

The main focus of the learning in this knowledge module is to build an understanding of premium administration principles, including premium calculation, adjustments, collection methods, reconciliation processes and the application of relevant insurance principles, enabling accurate and compliant administrative support in insurance operations.

The learning will enable learners to demonstrate an understanding of the topics listed below:

(b) List of Knowledge Topics:

The learning will enable learners to describe:

TOPIC CODE	TOPIC TITLE	% OF TIME TO BE SPENT
KM-04-KT01	Insurance principles relevant to premium administration	20%
KM-04-KT02	Premium calculation and adjustments	40%
KM-04-KT03	Premium payment, collection and reconciliation	40%

(c) Detailing each topic listed above into topic elements:

4. KM-04-KT01 INSURANCE PRINCIPLES RELEVANT TO PREMIUM ADMINISTRATION 20%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0101	Purpose and components of insurance premiums	30%
KT0102	Factors influencing premiums	30%
KT0103	Premium frequency, due dates and policy status	40%

(d) Internal Assessment Criteria (IAC) and Weight

IAC CODE	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0101	Explains the purpose and components of insurance premiums and the factors that may influence premium amounts	50%
IAC0102	Explains the relationship between premium payment, due dates and policy status	50%

(c) Detailing each topic listed above into topic elements:

4. KM-04-KT02 PREMIUM CALCULATIONS AND ADJUSTMENTS 40%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**

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KT0201	Basic principles of premium calculation	25%
KT0202	Calculate basic pro-rata mid-term adjustments using supplied information	25%
KT0203	Explain premium refunds and cancellation-related adjustments	50%

(d) Internal Assessment Criteria (IAC) and Weight

IAC CODE	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0201	Calculates basic pro-rata premium adjustments using supplied information and explains premium refunds and cancellation-related adjustments.	100%

(c) Detailing each topic listed above into topic elements:

4. KM-04-KT03 PREMIUM PAYMENT, COLLECTION AND RECONCILIATION 40%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0301	Describe payment methods (debit order, EFT, etc)	35%
KT0302	Describe premium collection methods	35%
KT0303	Interpret basic reconciliation information	30%

(d) Internal Assessment Criteria (IAC) and Weight

IAC CODE	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0301	Describes premium payment and collection methods and interprets basic premium reconciliation information, including receipting and the identification of discrepancies.	100%

Knowledge Module (KM) - 05

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-05	Regulatory and compliance framework in insurance	4	8	Face to face or online or blended

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(a) Purpose of Knowledge Module:

The main focus of the learning in this knowledge module is to build an understanding of the regulatory and compliance framework governing the insurance industry, including key regulatory role players, applicable legislation, ethical standards, and the consequences of non-compliance, enabling insurance administrators to operate within legal, regulatory, and organisational requirements.

The learning will enable learners to demonstrate an understanding of the topics listed below:

(b) List of Knowledge Topics:

TOPIC CODE	TOPIC TITLE	% OF TIME TO BE SPENT
KM-05-KT01	Insurance regulatory role players and institutional framework	25%
KM-05-KT02	Insurance legislation, compliance requirements and standards	45%
KM-05-KT03	Consequences of non-compliance, ethics, and compliance oversight	30%

(c) Detailing each topic listed above into topic elements:

KM-05-KT01 INSURANCE REGULATORY ROLE PLAYERS AND INSTITUTIONAL FRAMEWORK 25%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0101	Overview of insurance regulation in South Africa	20%
KT0102	Roles of the FSCA and Prudential Authority	50%
KT0103	Roles and functions of the National Financial Ombud Scheme and other applicable dispute-resolution structures	30%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0101	Explains the role and functions of the FSCA, Prudential Authority, National Financial Ombud Scheme and other applicable dispute-resolution structures.	100%

(c) Detailing each topic listed above into topic elements:

KM-05-KT02 INSURANCE LEGISLATION, COMPLIANCE REQUIREMENTS AND STANDARDS 45%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**

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KT0201	Overview of FAIS, FICA, Policyholder Protection Rules, Treating Customers Fairly (TCF) principles and other applicable conduct legislation	30%
KT0202	Overview of POPIA and data protection responsibilities	20%
KT0203	Compliance obligations of insurance administrators	25%
KT0204	Internal compliance policies and procedures	25%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0201	Explains the compliance responsibilities of insurance administrators within regulatory and organisational frameworks	60%
IAC0202	Describes applicable privacy, data protection, financial sector conduct, policyholder protection and fair-treatment requirements relevant to insurance administration	40%

(c) Detailing each topic listed above into topic elements:

KM-05-KT03 CONSEQUENCES OF NON-COMPLIANCE, ETHICS, AND COMPLIANCE OVERSIGHT 30%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0301	Consequences of regulatory non-compliance	25%
KT0302	Ethical breaches and misconduct in insurance	25%
KT0303	Importance of accurate recordkeeping	20%
KT0304	Purpose of compliance audit, monitoring and reporting requirements	30%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT

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IAC0301	Describes the consequences of non-compliance and ethical breaches in the insurance industry	50%
IAC0302	Explains the importance of recordkeeping, audit processes and regulatory reporting requirements	50%

Knowledge Module (KM) - 06

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-KM-06	Digital tools and technology in insurance administration	4	4	Face to face or online or blended

(a) Purpose of Knowledge Module:

The main focus of the learning in this knowledge module is to build an understanding of digital tools, systems, and technologies used in insurance administration, including policy administration systems, data management, communication tools, and cybersecurity awareness, enabling efficient, accurate, and compliant administrative support in an insurance environment.

The learning will enable learners to demonstrate an understanding of the topics listed below:

(b) List of Knowledge Topics:

The learning will enable learners to explain:

TOPIC CODE	TOPIC TITLE	% OF TIME TO BE SPENT
KM-06-KT01	Policy administration systems and insurance software	30%
KM-06-KT02	Digital capture, document management and recordkeeping systems	25%
KM-06-KT03	Digital communication tools and customer interaction platforms	20%
KM-06-KT04	Data security, cybersecurity and technology controls	25%

(c) Detailing each topic listed above into topic elements:

KM-06-KT01 POLICY ADMINISTRATION SYSTEMS AND INSURANCE SOFTWARE 30%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**

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KT0101	Purpose and functions of policy administration systems	20%
KT0102	Common insurance software and system features	25%
KT0103	System access, user roles, and permissions	25%
KT0104	Importance of data accuracy in digital systems	30%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0101	Explains the purpose and functions of policy administration systems and insurance software	50%
IAC0102	Describes system access controls, user roles, permissions and the importance of data accuracy in insurance administration systems.	50%

(c) Detailing each topic listed above into topic elements:

KM-06-KT02 DIGITAL DATA CAPTURE, DOCUMENT MANAGEMENT, AND RECORDKEEPING SYSTEMS 25%		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0201	Electronic data capture process	25%
KT0202	Document management systems (DMS)	25%
KT0203	Digital filing, version control and indexing	25%
KT0204	Record retention requirements in digital environments	25%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0201	Describes digital data capture, document management, and electronic recordkeeping systems	100%

(c) Detailing each topic listed above into topic elements:

KM-06-KT03 DIGITAL COMMUNICATION TOOLS AND CUSTOMER INTERACTION PLATFORMS 20%

FINAL

TOPIC ELEMENT CODE	TOPIC ELEMENT TITLE	% OF TIME TO BE SPENT
KT0301	Email, portals and workflow systems	25%
KT0302	Customer relationship management (CRM)	25%
KT0303	Digital correspondence standards and records	25%
KT0304	Risks and controls in digital communication	25%

(d) Internal Assessment Criteria (IAC) and Weight – overall weighting 20%

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0301	Explains the use of digital communication and customer interaction platforms in insurance administration	100%

(c) Detailing each topic listed above into topic elements:

KM-06-KT04 DATA SECURITY, CYBERSECURITY AND TECHNOLOGY CONTROLS (25%)		
TOPIC ELEMENT CODE	**TOPIC ELEMENT TITLE**	**% OF TIME TO BE SPENT**
KT0401	Information security and confidentiality concepts	20%
KT0402	Common cybersecurity risks in insurance administration	30%
KT0403	Data protection requirements relating to digital systems	25%
KT0404	Emerging technologies and trends affecting insurance administration such as AI, automation, robotic process automation	25%

(d) Internal Assessment Criteria (IAC) and Weight

IAC Code	IAC DESCRIPTION	% OF TIME TO BE SPENT
IAC0401	Describes data security, confidentiality responsibilities, and POPIA-related technology controls	50%
IAC0402	Explains emerging technologies and trends impacting insurance administration	50%

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3.1.2 Criteria for accreditation

Physical Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)	
EQUIPMENT & TOOLS	To ensure compliance and readiness for delivering a National Qualification in a blended training environment, a training provider must have tools and equipment across the following critical categories: **A. Face to Face Teaching and Learning.** **Equipment and Tools** • Multimedia projector, interactive screen, or smart board. • Printer, scanner, and photocopier. **Distance Teaching and Learning.** • Computer or laptop with internet connectivity • Virtual classroom and video conferencing platform • Online assessment and learner tracking system **Blended Teaching and Learning.** • **IT Infrastructure and Digital Tools**: Video conferencing software, computers and laptops with required software, internet. • **Physical Training Facilities**: Classrooms and training spaces with seating and lighting, projectors and whiteboards, audio-visual equipment for hybrid delivery. • **Assessment and Evaluation Tools**: Online assessment systems, software for secure remote invigilation. • **Communication and Collaboration Tools**: Email and messaging platforms
CONSUMABLES	**FACE TO FACE TRAINING** • Printing paper. • Pens, pencils, markers, and highlighters. • Flipchart paper, exam pads.

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	• File folders and document sleeves. **DISTANCE LEARNING** • Electronic learner guides and training materials. • Digital assessment instruments and answer sheets. • Software licences and user subscriptions. • Electronic communication and support documentation. • Digital portfolio of evidence templates. • Online learner registration and record-keeping forms. **BLENDED LEARNING** • Combination of both face to face and distance learning.

ASSESSMENT CENTRE	
EQUIPMENT & TOOLS	• Well-resourced training facilities or a Service Level Agreement with a suitable accredited training institution
CONSUMABLES	• Computers, pens, overhead projectors, optional and not limited to

Human Resource Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)	
QUALIFICATIONS & EXPERIENCE	Facilitator: NQF level 5 qualification or above and at least two years' experience in insurance or financial services industry.
FACILITATOR/LEARNER RATIO	Contact sessions 1: 25 Distance learning: 1:100

ASSESSMENT CENTRE	
QUALIFICATIONS & EXPERIENCE	ASSESSMENT CENTRE MANAGER: NQF Level 4 Qualification, and one year experience in overseeing a basic facility such as a training facility or an office facility. INVIGILATORS: Ability to communicate in English and proof of successful completion of invigilator training provided by the assessment quality Partner.
INVIGILATOR/LEARNER RATIO	1:10

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Legal Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)	
QUALIFICATIONS & EXPERIENCE	Facilitator: NQF level 5 qualification or above and at least two years' experience in insurance or financial services industry.
FACILITATOR/LEARNER RATIO	Contact sessions 1: 25 Distance learning: 1:100
Summary of Compliance Requirements • **Registration & Legal** → CIPC business registration, SARS tax clearance • **Health & Safety** → OHSA compliance audit report.	

ASSESSMENT CENTRE	
QUALIFICATIONS & EXPERIENCE	
FACILITATOR/LEARNER RATIO	
• **Registration & Legal** → CIPC business registration, OHSA regulations, SARS tax clearance	

Additional Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)
None

ASSESSMENT CENTRE
None

3.1.3 Exemptions

None

3.2 Practical Skill Module (PM) Specifications:

NB: MODE OF DELIVERY e.g. face-to-face/contact, online, e-learning, mobile training unit, blended, distance, etc

MODULE CODE	MODULE TITLE	NQF	CREDITS	MODE

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431204-002-00-PM-01	Administer policies and support underwriting administration	4	5	Face to face or online or blended learning
431204-002-00-PM-02	Deliver customer service	4	5	Face to face or online or blended learning
431204-002-00-PM-03	Perform premium administration duties	4	5	Face to face or online or blended learning
431204-002-00-PM-04	Perform regulatory and compliance support activities	4	5	Face to face or online or blended learning
431204-002-00-PM-05	Utilise digital tools and technology in insurance administration	4	5	Face to face or online or blended learning
431204-002-00-PM-06	Provide claims administration support	4	5	Face to face or online or blended learning

3.2.1 Detailing Practical Module (PM) contents

Practical Module (PM) - 01

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-PM-01	Administer policies and support underwriting administration	4	5	Face to face or online or blended learning

(a) Purpose of the Practical Skills Module:

The purpose of this Practical Skills Module is to enable learners to apply policy administration and documentation processes within an insurance environment. Learners will accurately capture, verify, process, maintain and retrieve client and policy information in accordance with organisational procedures and legislative requirements.

(b) List of Practical Skill Activities:

PRACTICAL SKILL CODE	ACTIVITY TITLE
PM-01-PS01	ADMINISTER POLICIES AND SUPPORT UNDERWRITING ADMINISTRATION

(c) Scope of each Practical Skill Activity:

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PRACTICAL SKILL ACTIVITY SCOPE OUTLINE:	
Accurately record, verify and maintain client and policy details on relevant systems and support routine underwriting administration by processing required information and documentation in accordance with organisational procedures.	
PRACTICAL SKILL ACTIVITY ELEMENT CODES	**PRACTICAL SKILL ACTIVITY ELEMENTS**
PA0101	Capture new policy applications correctly into insurance administration systems
PA0102	Verify completeness and compliance of client documentation
PA0103	Process endorsements, amendments and cancellations
PA0104	Prepare policy schedules, cover confirmations and related correspondence
PA0105	File and retrieve policy documents in physical and digital systems
PA0106	Use checklists to track processing steps and quality standards
PA0107	Perform policy checks on policy files for completeness and accuracy
PA0108	Collect and verify required information and documentation for routine underwriting administration and refer incomplete, inconsistent or non-standard information in accordance with organisational procedures.

(d) Internal Assessment Criteria (IAC)

IAC CODE	IAC DESCRIPTION
IAC0101	Client and policy data are accurately captured into the system, including information required to support routine underwriting administration.
IAC0102	Accurate policy documentation, related correspondence and required underwriting support information and documentation are prepared and referred in accordance with organisational procedures
IAC0103	Policy records are accurately filed and retrieved in accordance with organisational document control procedures
IAC0104	Endorsements, amendments and cancellations are accurately processed in accordance with organisational procedures
IAC0105	Self-checks are performed and quality control procedures are applied.

(e) Applied Knowledge that underpins the Practical Skill

APPLIED KNOWLEDGE CODE	APPLIED KNOWLEDGE

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AK0101	Policy administration processes, policy documentation and insurance fundamentals
AK0102	Insurance administration systems, document control procedures and applicable regulatory requirements

Practical Module (PM) - 02

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-PM-02	DELIVER CUSTOMER SERVICE	4	5	Face to face or online or blended learning

(a) Purpose of the Practical Skills Module:

The purpose of this Practical Skills Module is to enable learners to deliver professional customer service by responding to client enquiries, maintaining effective communication, resolving routine queries and escalating matters appropriately in accordance with organisational procedures.

(b) List of Practical Skill Activities:

PRACTICAL SKILL CODE	ACTIVITY TITLE
PM-02-PS01	DELIVER CUSTOMER SERVICE

(c) Scope of each Practical Skill Activity:

PRACTICAL SKILL ACTIVITY SCOPE OUTLINE	
Deliver professional customer service and communication within an insurance environment using approved communication channels and organisational procedures.	
PRACTICAL SKILL ACTIVITY ELEMENT CODES	**PRACTICAL SKILL ACTIVITY ELEMENTS**
PA0101	Handle client queries about policy details, cover, or procedures
PA0102	Use professional verbal and written communication and prepare routine customer correspondence
PA0103	Manage complaints by applying internal escalation processes
PA0104	Liaise with internal departments (e.g. underwriting or claims) for query resolution
PA0105	Practise telephone etiquette and first call resolution techniques
PA0106	Capture and maintain client interaction records securely in CRM systems in accordance with organisational information security and POPIA requirements.

(d) Internal Assessment Criteria (IAC)

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IAC CODE	IAC DESCRIPTION
IAC0101	Client queries are answered in a clear, professional and empathetic manner
IAC0102	Complex complaints are escalated in accordance with organisational protocol
IAC0103	Telephone and email etiquette is used correctly
IAC0104	Accurate and secure records of client interactions are maintained in CRM systems in accordance with organisational information security and data protection requirements.
IAC0105	Standard communication documents such as welcome packs and policy notices, are drafted.

(e) Applied Knowledge that underpins the Practical Skill

APPLIED KNOWLEDGE CODE	APPLIED KNOWLEDGE
AK0101	Insurance products, policy information and customer service procedures
AK0102	Communication techniques, complaints escalation, CRM systems and data protection requirements

Practical Module (PM) - 03

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-PM-03	PERFORM PREMIUM ADMINISTRATION DUTIES	4	5	Face to face or online or blended learning

(a) Purpose of the Practical Skills Module:

The purpose of this Practical Skills Module is to enable learners to perform routine premium administration activities including recording, allocating, reconciling, and monitoring premium transactions in accordance with organisational procedures.

(b) List of Practical Skill Activities:

PRACTICAL SKILL CODE	ACTIVITY TITLE
PM-03-PS01	PERFORM PREMIUM ADMINISTRATION DUTIES

(c) Scope of each Practical Skill Activity:

PRACTICAL SKILL ACTIVITY SCOPE OUTLINE	
To equip the learner with the ability in handling, reconciling and monitoring premium-related transactions throughout the policy lifecycle	
PRACTICAL SKILL ACTIVITY ELEMENT CODES	**PRACTICAL SKILL ACTIVITY ELEMENTS**

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PA0101	Reconcile premium received against invoices and schedules
PA0102	Issue invoices and payment reminders to clients
PA0103	Capture and allocate debit order or EFT payments in the system
PA0104	Process system-generated or verified pro-rata premium adjustments and refunds in accordance with organisational procedures.
PA0105	Identify and flag unpaid premium for follow-up
PA0106	Report variances between expected and actual payments
PA0107	Prepare payment schedules and receipts for policyholders

(d) Internal Assessment Criteria (IAC)

IAC CODE	IAC DESCRIPTION
IAC0101	Invoices and payment reminders are issued in accordance with internal schedules
IAC0102	Debit order and EFT payments are accurately recorded in the system
IAC0103	Pro-rata premium adjustments and refunds are correctly processed.
IAC0104	Premiums are reconciled with policy records, variances are identified and reported and accurate payment schedules and receipts are prepared.
IAC0105	Unpaid premium accounts are flagged, and basic collection notifications are prepared.

(e) Applied knowledge that underpins the Practical Skill

APPLIED KNOWLEDGE CODE	APPLIED KNOWLEDGE
AK0101	Apply premium administration, payment methods and basic reconciliation principles
AK0102	Process pro-rata adjustments, refunds, premium records and organisational financial procedures

Practical Module (PM) - 04

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

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431204-002-00-PM-04	PERFORM REGULATORY AND COMPLIANCE SUPPORT ACTIVITIES	4	5	Face to face or online or blended learning

(a) Purpose of the Practical Skills Module:

The purpose of this Practical Skills Module is to enable learners to apply regulatory, compliance, information security and organisational requirements during routine insurance administration activities.

(b) List of Practical Skill Activities:

PRACTICAL SKILL CODE	ACTIVITY TITLE
PM-04-PS01	PERFORM REGULATORY AND COMPLIANCE SUPPORT ACTIVITIES

(c) Scope of each Practical Skill Activity:

PRACTICAL SKILL ACTIVITY SCOPE OUTLINE	
To equip learners with the practical ability to identify, interpret and apply key insurance, regulatory and compliance requirements in workplace situations	
PRACTICAL SKILL ACTIVITY ELEMENT CODES	**PRACTICAL SKILL ACTIVITY ELEMENTS**
PA0101	Apply data protection, cybersecurity, and information security principles when handling client records and confidential information
PA0102	Complete compliance checklists for new policy onboarding
PA0103	Identify and flag suspicious documentation, irregularities, compliance concerns or potential operational risk indicators in accordance with organisational procedures.
PA0104	Assist with audit preparation or file verification exercises
PA0105	Record evidence of client consent and declarations
PA0106	Apply TCF principles in client interactions and document handling
PA0107	Refer compliance breach or unresolved compliance concerns to senior personnel

(d) Internal Assessment Criteria (IAC)

IAC CODE	IAC DESCRIPTION

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IAC0101	Regulatory, cybersecurity, and information security principles are applied when customer records and organisational information are handled.
IAC0102	Policy compliance checklists are completed during onboarding.
IAC0103	Suspicious activity, irregularities, compliance concerns and operational risk indicators are identified and flagged in accordance with organisational procedures.
IAC0104	Client declarations and consent are accurately documented.
IAC0105	Audit preparation or file verification activities are supported by the accurate checking and organisation of complete compliance documentation in accordance with organisational procedures.
IAC0106	TCF principles are applied during routine administration and unresolved compliance concerns are escalated in accordance with organisational procedures.

(e) Applied Knowledge that underpins the Practical Skill

APPLIED KNOWLEDGE CODE	APPLIED KNOWLEDGE
AK0101	Insurance regulatory framework, compliance responsibilities and organisational procedures
AK0102	Know data protection, cybersecurity, information security, TCF and organisational compliance procedures

Practical Module (PM) - 05

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-PM-05	UTILISE DIGITAL TOOLS AND TECHNOLOGY IN INSURANCE ADMINISTRATION	4	5	Face to face or online or blended learning

(a) Purpose of the Practical Skills Module:

The purpose of this Practical Skills Module is to enable learners to utilise digital tools, insurance administration systems, document management systems, and digital communication platforms while applying cybersecurity, information security and data protection practices to support efficient insurance administration.

(b) List of Practical Skill Activities:

PRACTICAL SKILL CODE	ACTIVITY TITLE

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PM-05-PS01	UTILISE DIGITAL TOOLS AND TECHNOLOGY IN INSURANCE ADMINISTRATION

(c) Scope of each Practical Skill Activity:

PRACTICAL SKILL ACTIVITY SCOPE OUTLINE	
Apply digital technologies used within insurance administration while maintaining data integrity, cybersecurity, information security, and organisational requirements.	
PRACTICAL SKILL ACTIVITY ELEMENT CODES	**PRACTICAL SKILL ACTIVITY ELEMENTS**
PA0101	Navigate insurance CRM or policy management platforms.
PA0102	Capture and update policy and client records in real-time.
PA0103	Extract routine policy, claims, financial and administrative reports from digital systems.
PA0104	Upload and manage scanned documents on DMS (document management system).
PA0105	Identify and resolve basic user errors or refer them in accordance with organisational procedures.
PA0106	Use built-in system tools to track policy and claims workflows
PA0107	Use approved templates and system features to prepare routine customer communications and reports.
PA0108	Apply basic cybersecurity practices, including secure password management, multi-factor authentication, phishing awareness, secure handling of electronic information, and reporting suspected cybersecurity incidents in accordance with organisational procedures.

(d) Internal Assessment Criteria (IAC)

IAC CODE	**IAC DESCRIPTION**
IAC0101	CRM and administrative platforms are navigated to capture and retrieve data
IAC0102	Documents are uploaded and categorised correctly in digital storage systems

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IAC0103	Routine reports are extracted and system tools are used to track policy and claims workflows
IAC0104	Simple system errors are identified and resolved or referred appropriately
IAC0105	Templates and system features are used to generate client communications
IAC0106	Organisational cybersecurity practices, including secure password management, use of multi-factor authentication, phishing awareness, secure handling of electronic information and reporting of suspected cybersecurity incidents, are applied in accordance with organisational procedures

(e) Applied Knowledge that underpins the Practical Skill

APPLIED KNOWLEDGE CODE	APPLIED KNOWLEDGE
AK0101	Digital data governance, data quality and ethical use of technology
AK0102	Understanding of insurance administration systems, digital technologies, cybersecurity principles, information security controls, and organisational procedures for protecting electronic information.

Practical Module (PM) - 06

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-PM-06	PROVIDE CLAIMS ADMINISTRATION SUPPORT	4	5	Face to face or online or blended learning

(a) Purpose of the Practical Skills Module:

Learners will demonstrate the ability to support the claims administration process by receiving and registering claims, capturing and maintaining claims information, verifying the completeness of required documentation, communicating routine claims progress, maintaining accurate claims records and escalating non-routine matters in accordance with organisational procedures.

(b) List of Practical Skill Activities:

PRACTICAL SKILL CODE	ACTIVITY TITLE
PM-06-PS01	PROVIDE CLAIMS ADMINISTRATION SUPPORT

(c) Scope of each Practical Skill Activity:

PRACTICAL SKILL ACTIVITY SCOPE OUTLINE

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Receive, register and maintain claims information and documentation, communicate routine claims progress and escalate non-routine matters in accordance with organisational procedures.	
PRACTICAL SKILL ACTIVITY ELEMENT CODES	**PRACTICAL SKILL ACTIVITY ELEMENTS**
PA0101	Receive, register and capture claims accurately on the claims administration system
PA0102	Verify that required claims documentation has been submitted and record outstanding information in accordance with organisational procedures.
PA0103	Update claims records, maintain supporting documentation, and communicate routine claims progress to clients and relevant stakeholders.
PA0104	Escalate incomplete, complex or non-routine claims to the appropriate claims' personnel in accordance with organisational procedures

(d) Internal Assessment Criteria (IAC)

IAC CODE	**IAC DESCRIPTION**
IAC0101	Claims information is accurately captured on the claims administration system.
IAC0102	The completeness of required claims documentation is verified and outstanding information is accurately recorded
IAC0103	Claims records are maintained and routine claims progress is communicated professionally to relevant stakeholders.
IAC0104	Incomplete, complex or non-routine claims are escalated in accordance with organisational procedures.

(e) Applied Knowledge that underpins the Practical Skill

APPLIED KNOWLEDGE CODE	**APPLIED KNOWLEDGE**
AK0101	Claims administration processes, documentation requirements and policy information
AK0102	Claims administration systems, customer service, record management and applicable organisational and regulatory requirements.

3.2.2. Criteria for accreditation

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Physical Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)	
EQUIPMENT & TOOLS	To ensure compliance and readiness for delivering a National Qualification for insurance administrators in a blended training environment, a training provider must have tools and equipment across the following categories: **B. Face to Face Teaching and Learning.** **Equipment and Tools** • Projector. • Printer, scanner, and photocopier. **Distance Teaching and Learning.** • Computer or laptop with internet connectivity • Virtual classroom and video conferencing platform • Insurance administration and customer relationship management (CRM) software • Online assessment and learner tracking system **Blended Teaching and Learning.** • **IT Infrastructure and Digital Tools**: Video conferencing software, computers and laptops with required software, internet. • **Physical Training Facilities**: Classrooms and training spaces with seating and lighting, projectors and whiteboards. • **Assessment and Evaluation Tools**: Online assessment systems, simulated insurance administration systems or practical case-based environments. • **Communication and Collaboration Tools**: Email and messaging platforms.
CONSUMABLES	**FACE TO FACE TRAINING** • Printing paper. • Pens, pencils, markers, and highlighters. • Printer ink and toner cartridges. • Flipchart paper, Executive pads. • File folders and document sleeves. **DISTANCE LEARNING** • Electronic learner guides and training materials. • Digital assessment instruments and answer sheets. • Software licences and user subscriptions. • Electronic communication and support documentation. • Digital portfolio of evidence templates. • Online learner registration and record-keeping forms. **BLENDED LEARNING** • Combination of both face to face and distance learning.

ASSESSMENT CENTRE

FINAL

EQUIPMENT & TOOLS	• Computer or laptop workstations for candidates and assessors. • Secure online or network-based assessment management system. • Internet connectivity and local area network infrastructure. • Printer, scanner, and photocopier. • Audio-visual recording equipment for assessment and moderation purposes.
CONSUMABLES	• Printing paper. • Printer ink and toner cartridges. • Assessment stationery (pens, pencils, markers, and notepads). • Data storage and backup media.

Human Resource Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)	
QUALIFICATIONS & EXPERIENCE	**QUALIFICATION:** Facilitators of learning must be in possession of a recognised and valid NQF Level 5 Qualification or above within the insurance or financial services industry. **EXPERIENCE:** Facilitators of Learning must have a minimum of two years' relevant insurance industry work experience.
FACILITATOR/LEARNER RATIO	**CONTACT SESSIONS:** 1:10 **DISTANCE LEARNING:** 1:100

ASSESSMENT CENTRE	
QUALIFICATIONS & EXPERIENCE	ASSESSMENT CENTRE MANAGER: NQF Level 4 Qualification, and one year experience in overseeing a basic facility such as a training facility or an office facility. INVIGILATORS: Ability to communicate in English and proof of successful completion of invigilator training provided by the assessment quality Partner.
INVIGILATOR/CANDIDATE RATIO	1:10

Legal Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)	
	Summary of Compliance Requirements • **Registration & Legal** → CIPC business registration, SARS tax clearance • **Health & Safety** → OHSA compliance audit report.

ASSESSMENT CENTRE	
	• **Registration & Legal** → CIPC business registration, OHSA regulations, SARS tax clearance.

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Additional Requirements:

SKILLS DEVELOPMENT PROVIDER (SDP)
None

ASSESSMENT CENTRE
None

3.3 Work Experience Module (WM) Specifications:

NB: MODE OF DELIVERY e.g. face-to-face/contact, online, e-learning, mobile training unit, blended, distance, etc

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-01	Insurance Industry Operations and Underwriting Administration Support Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.
431204-002-00-WM-02	Process Insurance Products and Service Support	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.
431204-002-00-WM-03	Policy administration and Underwriting Support Processes	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.
431204-002-00-WM-04	Premium Administration Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.
431204-002-00-WM-05	Regulatory and Compliance Support Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

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431204-002-00-WM-06	Digital Systems and Technology in Insurance Administration	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.
431204-002-00-WM-07	Claims Administration Processes	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

3.3.1 Detailing Work Experience Module (WM) contents

Work Experience Module (WM) – 01

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-01	Insurance Industry Operations and Underwriting Administration Support Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this work experience module is to provide learners with workplace exposure to the role of the insurance administrator, the role of insurance and risk management in society, and the application of professionalism and ethical conduct within an insurance workplace environment.

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-01-WE01	Perform routine insurance administration activities
WM-01-WE02	Relate insurance and risk principles to workplace activities
WM-01-WE03	Apply professionalism and ethics

(c) Scope of each Work Experience Competency:

WM-01-WE01 COMPETENCY TITLE… Perform routine insurance administration activities
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE Perform routine insurance administration activities in accordance with organisational workflows, procedures and documentation requirements.

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WORK EXPERIENCE COMPETENCY ELEMENT CODES	WORK EXPERIENCE COMPETENCY ELEMENTS
WA0101	Identify the key responsibilities of an insurance administrator.
WA0102	Follow insurance administration workflows, processes and documentation requirements and organisational procedures accurately and efficiently.
WA0103	Communicate effectively with clients, colleagues, and service providers.

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0101	Complete policy administration tasks including data capture, updates, and maintenance on insurance administration systems (e.g. policy amendments, endorsements, cancellations).
SE0102	Evidence of client and internal communication including emails, call logs and task instructions, demonstrating correct information sharing and follow-up.
SE0103	Supervisor or workplace confirmation of understanding and execution of daily insurance administration duties according to organisational procedures.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understands the insurance administrator's role by accurately capturing, updating, and maintaining policy and claims information on internal systems.
2	Understands administrative workflows, including document control, recordkeeping, and adherence to turnaround times in line with organisational procedures.
3	Communicates clearly and professionally with clients, colleagues, and service providers to obtain, confirm, or relay insurance-related information.
4	Understands the importance of accuracy in administrative duties to prevent policy errors, client dissatisfaction, or compliance breaches.

(c) Scope of each Work Experience Competency:

WM-01-WE02 COMPETENCY TITLE…Relate insurance and risk principles to workplace operations
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE

FINAL

Relate insurance and risk principles observed in workplace activities to risk pooling, risk transfer and financial protection for individuals and businesses.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0201	Identify workplace examples of risks that may be transferred or managed through insurance.
WA0202	Relate insurance products and services encountered in the workplace to risk pooling, risk transfer and financial protection.
WA0203	Identify how different types of insurance provide financial protection to individuals and businesses
WA0204	Explain how insurance administration supports the delivery of insurance products and services.

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0201	Completed workplace activity identifying risks and the insurance products or services used to provide financial protection.
SE0202	Evidence of workplace examples demonstrating risk pooling, risk transfer or financial protection principles.
SE0203	Workplace activity or discussion record relating different types of insurance to their benefits for individuals, businesses and the economy.
SE0204	Supervisor confirmation of the learner's understanding of how insurance administration supports the delivery of insurance products and services.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand the purpose and function of insurance and risk management within society and the economy.
2	Understand risk pooling, risk transfer and financial protection principles as observed within insurance operations.
3	Understand different types of insurance and their role in protecting individuals and businesses.
4	Understand how insurance administration supports the delivery of insurance products and services.

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(c) Scope of each Work Experience Competency:

WM-01-WE03 COMPETENCY TITLE…Apply professionalism and ethics	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE	
Demonstrate professional, ethical and responsible conduct during routine insurance administration activities.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0301	Use professionalism, integrity and responsible conduct in workplace interactions
WA0302	Communicate professionally with clients, colleagues, insurers and service providers.
WA0303	Comply with organisational codes of conduct, confidentiality requirements and ethical standards.

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0301	Evidence of completed workplace training or induction relating to ethics, professionalism, confidentiality or organisational codes of conduct.
SE0302	Evidence of secure and confidential handling of client and organisational information.
SE0303	Workplace examples or supervisor confirmation demonstrating professional conduct in interactions with clients, colleagues, insurers or service providers.
SE0304	Supervisor feedback or records demonstrating adherence to organisational procedures, appropriate escalation of issues and ethical conduct.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand professionalism, honesty, respect and responsible conduct in interactions with clients, colleagues and service providers.
2	Understand TCF principles, ethical conduct and organisational compliance procedures in daily insurance administration activities, including when supporting clients, processing information and managing data.
3	Understand accurate record management, professional stakeholder interaction and the escalation of non-compliance in accordance with organisational and industry requirements.

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Work Experience Module (WM) – 02

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-02	Process Insurance Products and Service Support	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this Work Experience Module is to provide learners with workplace exposure to insurance products, policy components and coverage, and to enable them to provide factual product and policy information and support routine customer enquiries within the scope of an insurance administrator.

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-02-WE01	Identify and explain policy components for administrative purposes
WM-02-WE02	Differentiate insurance products and cover
WM-02-WE03	Handle routine product and policy enquiries and complaints

(c) Scope of each Work Experience Competency:

WM-02-WE01…COMPETENCY TITLE… Identify and explain policy components for administrative purposes	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE	
Use insurance policy documents to identify and explain key policy components, including schedules, operative clauses, terms, conditions, exclusions, extensions and endorsements, for routine administrative and customer support purposes.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0101	Identify key components of insurance policy documents
WA0102	Explain the purpose of policy schedules, operative clauses, terms, conditions, exclusions, extensions and endorsements.
WA0103	Review policy documents for completeness and consistency with available policy records and refer discrepancies in accordance with organisational procedures.

(d) Supporting evidence

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WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0101	Evidence of reviewing and explaining policy documents, including schedules, wording, endorsements, excesses, exclusions, and conditions.
SE0102	Evidence of policy documentation checked for completeness or consistency and discrepancies identified or referred.
SE0103	Examples of administrative support provided where policy components were clarified to clients, intermediaries, colleagues or service providers.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understands standard insurance policy component, including premiums, sums insured, excesses, exclusions, terms and conditions.
2	Understands how policy information is explained accurately and in plain language within the scope of an insurance administrator.
3	Understands how policy components may affect cover, claims processes and customer expectations.

(c) Scope of each Work Experience Competency:

WM-02-WE02…COMPETENCY TITLE… Differentiate insurance products and cover	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Use workplace product information and policy documentation to distinguish between insurance products, classes of insurance and types of cover for administrative and customer support purposes.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0201	Identify different classes and types of insurance products encountered in the workplace
WA0202	Distinguish product features, cover, benefits, exclusions and limits for administrative purposes.
WA0203	Provide factual product and policy information within the administrator's authority and refer advice-related enquiries appropriately.

(d) Supporting evidence

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WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0201	Evidence of workplace exposure to different insurance products, classes and types of cover.
SE0202	Examples of administrative tasks where product or cover differences were identified and communicated (policy comparisons, internal queries, client enquiries).
SE0203	Supervisor confirmation that factual product and cover information was provided accurately and advice-related or non-routine enquires were referred appropriately.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understands different insurance products and the types of risks they cover.
2	Understands key differences between products, including scope of cover, benefits, exclusions, limits and optional cover.
3	Understands the distinction between providing factual product information and providing advice, and the organisational procedures for referral or escalation.

(c) Scope of each Work Experience Competency:

WM-02-WE03…COMPETENCY TITLE…Handle routine product and policy enquiries and complaints	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Understands customer service principles when handling routine product and policy enquiries, complaints and updates in a professional and ethical manner	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0301	Engage professionally with clients in person, telephonically or through approved digital communication channels.
WA0302	Resolve client enquiries or concerns and provide accurate factual product, policy or administrative information.
WA0303	Apply organisational communication, recordkeeping and escalation procedures.

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE

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SE0301	Evidence of handling client enquiries relating to products, policies, cover, premiums or administrative processes such as call logs, emails or CRM records).
SE0302	Evidence of complaints recorded, handled or escalated in accordance with organisational procedures and required timeframes.
SE0303	Supervisor observation or confirmation demonstrating professional communication, active listening, empathy, accurate information sharing and appropriate escalation.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand CRM and call logging systems, data privacy requirements and organisational procedures for sharing client information.
2	Understand complaint lodgement, -handling and escalation timeframes, internal service level requirements and the role of the relevant ombud structures.
3	Understand Treating Customers Fairly principles when handling client enquiries, concerns and complaints.

Work Experience Module (WM) - 03

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-03	Policy administration and Underwriting Support Processes	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this Work Experience Module is to provide learners with workplace exposure to policy administration, underwriting support, document management and routine quality control activities within an insurance operational environment.

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-03-WE01	Perform policy administration and document management activities
WM-03-WE02	Participate in internal quality control checks

(c) Scope of each Work Experience Competency:

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WM-03-WE01…COMPETENCY TITLE… Perform policy administration, underwriting support and document management activities under supervision and in accordance with standard operating procedures and organisational requirements.	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE	
Perform routine policy administration and document management activities under supervision and in accordance with standard operating procedures and organisational requirements.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0101	Process routine new business and renewal documentation and related correspondence under supervision.
WA0102	Process routine policy amendments, endorsements and cancellations in accordance with organisational procedures and authorised instructions.
WA0103	Capture, update and verify client and policy information on insurance administration systems.
WA0104	Verify supporting documentation and file, index and store policy records in approved organisational repositories.
WA0105	Collect and verify required information and documentation for routine underwriting administration and refer incomplete, inconsistent or non-standard information in accordance with organisational procedures.

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0101	Evidence of processing routine new business or renewal documentation and related correspondence under supervision.
SE0102	Evidence of routine policy amendments, endorsements or cancellations processed in accordance with organisational procedures and authorised instructions.
SE0103	Records demonstrating accurate capture, updating and verification of client and policy information on insurance administration systems.
SE0104	Evidence of supporting documentation verified, and policy records correctly filed, indexed and stored in approved organisational repositories.
SE0105	Evidence of underwriting support information and documentation collected and verified, including evidence of incomplete, inconsistent or non-standard information appropriately referred, or supervisor confirmation of the activity.

FINAL

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understanding of routine policy administration activities, including new business, renewals, endorsements, amendments and cancellations.
2	Understanding of standard operating procedures for capturing, updating and verifying client and policy information.
3	Understanding of document verification, filing, indexing, storage and record control requirements and their importance for compliance and efficient service delivery.
4	Understand the information, documentation and referral requirements for routing underwriting administration support

(c) Scope of each Work Experience Competency:

WM-03-WE02…COMPETENCY TITLE…Participate in internal quality control checks	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Participate in routine quality control checks to identify and report incomplete, inaccurate or inconsistent insurance administration records.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0201	Check policy files and administrative records for completeness and accuracy using prescribed checklists or quality control procedures.
WA0202	Identify and record missing information, discrepancies or administrative errors.
WA0203	Correct authorised administrative errors or refer discrepancies in accordance with organisational procedures.

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0201	Evidence of policy files or administrative records checked for completeness and accuracy using prescribed checklists or quality control procedures.
SE0202	Evidence of missing information, discrepancies or administrative errors identified and recorded.
SE0203	Evidence or supervisor confirmation of authorised corrections completed, or discrepancies referred in accordance with organisational procedures.

(e) Contextualised Workplace Knowledge

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WORKPLACE KNOWLEDGE	
1	Understand the purpose of quality control checks in insurance administration.
2	Understand common administrative errors, including missing documentation, inaccurate information and incomplete data capture.
3	Understand organisational procedures for correcting authorised administrative errors and referring discrepancies or non-routine matters.

Work Experience Module (WM) - 04

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-04	Premium Administration Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this Work Experience Module is to provide learners with workplace exposure to the processing, allocation and reconciliation of premium transactions, authorised premium adjustments and refunds, premium collection and payment administration procedures, and the follow-up of overdue premiums.

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-04-WE01	Process and reconcile premium transactions and adjustments
WM-04-WE02	Apply premium collection and payment administration procedures
WM-04-WE03	Identify and follow up overdue premium situations

(c) Scope of each Work Experience Competency:

WM-04-WE01…COMPETENCY TITLE… Process and reconcile premium transactions and adjustments	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE	
Verify system-generated premium amounts in accordance with policy information, product rules and organisational requirements, allocate and reconcile premium transactions, process authorised adjustments and refunds.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0101	Verify relevant policy and transaction information used in system-generated premium amounts and adjustments.

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WA0102	Verify system-generated premium amounts and allocate and reconcile premium transactions.
WA0103	Process authorised premium adjustments and refunds in accordance with organisational procedures

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0101	System records, screenshots or reports showing premium amounts and transactions verified, allocated or reconciled by the learner.
SE0102	Supervisor confirmation of accurate premium transaction processing and reconciliation.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand premium components, payment frequency and policy or transaction information relevant to system-generated premium amounts and adjustments.
2	Understand insurance administration systems and organisational procedures used to allocate, reconcile and process premium transactions, adjustments and refunds.

(c) Scope of each Work Experience Competency:

WM-04-WE02…COMPETENCY TITLE…Apply premium collection and payment administration procedures	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Apply organisational procedures when administering premium collection and payment methods, communicating payment information and responding to routine payment exceptions.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0201	Process or support premium collection and payment transactions through applicable organisational payment methods and channels.
WA0202	Verify and record payment information in accordance with organisational procedures and applicable control requirements.
WA0203	Communicate factual payment information, requirements or payment options to clients or intermediaries within the scope of the administrator role.
WA0204	Identify failed or dishonoured payments and follow applicable referral or follow-up procedures.

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(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0201	Evidence of premium collection or payment transactions processed, verified or recorded using applicable organisational systems.
SE0202	Client or intermediary communication relating to payment information, requirements or applicable payment options.
SE0203	Evidence of failed or dishonoured payments identified and referred or followed up in accordance with organisational procedures.
SE0204	Supervisor confirmation that premium collection and payment administration procedures were applied correctly.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand premium collection and payment methods and the organisational controls applicable to their administration.
2	Understand applicable premium collection requirements, payment continuity and customer communication requirements.
3	Understand failed or dishonoured payment processes and applicable referral, follow-up and escalation procedures.

(c) Scope of each Work Experience Competency:

WM-04-WE03…COMPETENCY TITLE… Identify and follow up overdue premium situations	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Identify and monitor overdue or unpaid premium situations and perform routine follow-up activities in accordance with organisational procedures.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0301	Identify overdue or unpaid premiums through system reports, account records or reconciliations
WA0302	Apply organisational procedures regarding grace periods, arrear notifications and follow-up timelines
WA0303	Perform routine follow-up communication or refer overdue premium matters in accordance with organisational procedures.

(d) Supporting evidence

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WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0301	System records or reports showing overdue or unpaid premium situations identified by the learner.
SE0302	Evidence of arrear notifications, routine follow-up activities or referrals completed in accordance with organisational procedures.
SE0303	Supervisor confirmation that overdue premium procedures and required timelines were correctly followed.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand grace periods, overdue premium processes and the potential consequences of non-payment across applicable insurance products.
2	Understand organisational communication, follow-up, referral and escalation procedures for overdue premiums.
3	Understand fair customer treatment principles when administering overdue premium situations.

Work Experience Module (WM) – 05

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-05	Regulatory and Compliance Support Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this Work Experience Module is to provide learners with workplace exposure to the application of regulatory, compliance, monitoring and fair customer treatment requirements within insurance administration activities.

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-05-WE01	Apply regulatory and compliance requirements in insurance administration.
WM-05-WE02	Apply compliance monitoring and reporting procedures.
WM-05-WE03	Apply consumer protection, policyholder protection and fair-treatment requirements during insurance administration.

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(c) Scope of each Work Experience Competency:

WM-05-WE01… Apply regulatory and compliance requirements in insurance administration	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE	
Apply applicable consumer protection, policyholder protection and fair-treatment requirements during routine insurance administration, client communication and complaints handling activities.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0101	Identify the regulatory and compliance requirements applicable to routine insurance administration activities within the workplace.
WA0102	Apply applicable regulatory and compliance requirements when processing insurance information and documentation.
WA0103	Refer regulatory or compliance matters outside the learner's authority in accordance with organisational procedures.

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0101	Evidence of routine insurance administration tasks completed in accordance with applicable regulatory and compliance requirements.
SE0102	Completed compliance, onboarding or document-processing checklists demonstrating application of applicable requirements.
SE0103	Evidence or supervisor confirmation of regulatory or compliance matters appropriately referred or escalated.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand the South African insurance regulatory environment and the regulatory requirements relevant to the learner's area of work.
2	Understand how applicable regulatory and compliance requirements affect policy administration, documentation and client interactions.
3	Understand organisational procedures and authority limits for referring regulatory or compliance matters.

(c) Scope of each Work Experience Competency:

WM-05-WE02…COMPETENCY TITLE… Apply compliance monitoring and reporting procedures
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:

FINAL

Apply internal compliance controls, monitoring, recordkeeping and reporting procedures within the learner's area of work.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0201	Identify potential compliance risks, irregularities or non-compliance within own area of work.
WA0202	Complete applicable compliance checks and maintain required compliance records.
WA0203	Report or escalate identified compliance concerns in accordance with organisational procedures.
WA0204	Participate in routine compliance monitoring or audit-readiness activities where applicable.

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0201	Completed compliance checklists, monitoring records or other evidence of routine compliance checks performed
SE0202	Evidence of compliance risks, irregularities or concerns identified and reported or escalated.
SE0203	Evidence or supervisor confirmation of participation in compliance monitoring, record verification or audit-readiness activities.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand internal compliance structures, responsibilities and reporting lines
2	Understand compliance monitoring, recordkeeping, record-retention and audit-readiness requirements.
3	Understand organisational procedures for reporting and escalating compliance risks, irregularities or non-compliance.

(c) Scope of each Work Experience Competency:

WM-05-WE03…COMPETENCY TITLE… Apply consumer protection, policyholder protection and fair-treatment requirements during insurance administration.
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:
Explain how Consumer Protection Act, TCF and PPR principles guide client interactions, claims handling, complaint resolution, ensuring fair outcomes

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WORK EXPERIENCE COMPETENCY ELEMENT CODES	WORK EXPERIENCE COMPETENCY ELEMENTS
WA0301	Apply fair-treatment principles during routine client interactions and insurance administration activities.
WA0302	Apply applicable customer and policyholder requirements during documentation, policy changes, cancellations, renewals and routine complaints handling

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0301	Evidence of routine insurance administration or client interaction activities demonstrating application of fair-treatment and consumer protection requirements.
SE0302	Evidence of situations with potential for unfair customer outcomes identified and appropriately referred or escalated.
SE0303	Supervisor confirmation of conduct consistent with the Consumer Protection Act (where applicable), Policyholder Protection Rules and Treating Customers Fairly (TCF) principles.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand the Consumer Protection Act (where applicable), the Policyholder Protection Rules (PPRs), and Treating Customers Fairly (TCF) principles applicable to insurance administration.
2	Understand how Treating Customers Fairly (TCF) principles and the Policyholder Protection Rules apply to client communication, documentation, policy changes, cancellations, renewals, claims administration support and complaints handling.
3	Understand organisational procedures for identifying, preventing and escalating potential unfair customer outcomes.

Work Experience Module (WM) – 06

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-06	Digital Systems and Technology in Insurance Administration	4	5	On-the-job. Simulated workplace activities may be used where actual workplace

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				exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this Work Experience Module is to enable learners to apply digital tools, insurance administration systems, and technology-enabled processes to support efficient, accurate, and compliant insurance administration activities within the workplace.

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-06-WE01	Utilise digital platforms for insurance administration
WM-06-WE02	Generate and use operational reports within insurance administration systems
WM-06-WE03	Use digital communication and collaboration tools to support insurance administration

(c) Scope of each Work Experience Competency:

WM-06-WE01…COMPETENCY TITLE… Utilise digital platforms for insurance administration	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE	
Demonstrate the ability to use core insurance systems and digital platforms (such as CRM, policy management, claims systems), capturing client information securely	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0101	Operate insurance administration systems for data entry and updates
WA0102	Maintain data integrity and confidentiality within digital systems.

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0101	Screenshots or reports generated from digital systems
SE0102	Supervisor verification of system transactions completed

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand systems and workflow in insurance operations
2	Understand data privacy, confidentiality and information security requirements applicable to insurance administration.

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(c) Scope of each Work Experience Competency:

WM-06-WE02…COMPETENCY TITLE…Generate and use routine operational reports within insurance administration systems	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Use reporting tools within insurance administration systems to generate and verify routine operational information for administrative purposes.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0201	Generate routine policy, premium, claims or workflow reports
WA0202	Verify report information
WA0203	Use reports to identify outstanding tasks, exceptions or follow-up actions

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0201	Copies or system evidence of routine policy, premium, claims or workflow reports generated by the learner.
SE0202	Evidence of report information verified, and outstanding tasks, exceptions or follow-up actions identified.
SE0203	Supervisor confirmation that reports were generated, verified and used in accordance with organisational procedures.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand the purpose and use of routine policy, premium, claims and workflow reports within insurance administration.
2	Understand basic report interpretation and how operational reports support workflow management and decision-making.

(c) Scope of each Work Experience Competency:

WM-06-WE03…COMPETENCY TITLE…Use digital communication and collaboration tools to support insurance administration
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:
Proficiency in using digital communication and collaboration platforms (e.g. Teams, Outlook, SharePoint, Zoom) for efficient client service and internal coordination

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WORK EXPERIENCE COMPETENCY ELEMENT CODES	WORK EXPERIENCE COMPETENCY ELEMENTS
WA0301	Communicate effectively with clients and colleagues using digital channels.
WA0302	Manage digital records of communication to ensure traceability and professionalism.

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0301	Email correspondence or chat logs evidencing customer or colleague interactions.
SE0302	Supervisor evaluation of communication and collaboration effectiveness.

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand professional digital communication etiquette and record-keeping standards.
2	Understand organisational digital communication protocols and information security requirements.

Work Experience Module (WM) – 07

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-07	Claims Administration Processes	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

(a) Purpose of the Work Experience Module:

The purpose of this Work Experience Module is to provide learners with workplace exposure to manage claims efficiently, ethically and in accordance with organisational and regulatory standards

(b) List of Work Experience Competencies:

WORK EXPERIENCE CODE	WORK EXPERIENCE COMPETENCY TITLE
WM-07-WE01	Receive, register and maintain claims information and documentation

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WM-07-WE02	Support claims processing and escalation activities
WM-07-WE03	Communicate routine claims progress and maintain claims records

(c) Scope of each Work Experience Competency:

WM-07-WE01…COMPETENCY TITLE… Receive, register and maintain claims information and documentation	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Ensure required documentation is received, confirmation that the claim falls within the scope of cover and check for potential discrepancies or fraud indicators.	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0101	Verify that claim information and supporting documentation correspond with the applicable policy wording and refer the claim in accordance with organisational procedures.
WA0102	Verify completeness and accuracy of information
WA0103	Identify potential fraudulent or suspicious claims

(d) Supporting evidence

WORK EXPERIENCE CODES	**SUPPORTING EVIDENCE**
SE0101	Sample claim forms with validation checks
SE0102	Checklist of required supporting documents

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand policy terms and conditions
2	Understand red flags and indicators

(c) Scope of each Work Experience Competency:

WM-07-WE02…COMPETENCY TITLE… Support claims processing and escalation activities	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Prepare documents, verify information, update systems and support processing	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**

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WA0201	Prepare claims documentation for assessment and payment processing
WA0202	Verify claims information and supporting documentation before assessment
WA0203	Update claims records and refer documentation for payment processing

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE
SE0201	Claims processing records, system-generated claim records, or supervisor confirmation of claims administration support activities.
SE0202	System audit logs

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand claims procedures and workflow
2	Understand documentation requirements and organisational procedures

(c) Scope of each Work Experience Competency:

WM-07-WE03…COMPETENCY TITLE… Communicate routine claims progress and maintain claims records	
WORKPLACE EXPERIENCE COMPETENCY SCOPE OUTLINE:	
Manage communication with stakeholders, ensure accurate and timely record-keeping	
WORK EXPERIENCE COMPETENCY ELEMENT CODES	**WORK EXPERIENCE COMPETENCY ELEMENTS**
WA0301	Understand the requirements for maintaining accurate and complete claims records and audit trails.
WA0302	Understand professional communication, confidentiality and data protection requirements when communicating claims progress.
WA0303	Understand routine claims workflow, service standards and escalation procedures.

(d) Supporting evidence

WORK EXPERIENCE CODES	SUPPORTING EVIDENCE

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SE0301	Email, call logs
SE0302	Audit trail documentation

(e) Contextualised Workplace Knowledge

WORKPLACE KNOWLEDGE	
1	Understand the requirements for maintaining accurate and complete claims records and audit trails
2	Understand professional communication, confidentiality and data protection requirements when communicating claims progress.
3	Understand routine claims workflow, service standards and escalation procedures

3.3.2 Criteria for accreditation

Physical Requirements:

RECOGNISED WORKPLACE	
EQUIPMENT & TOOLS	Summary of Physical Tools and Equipment • **Computers and Software:** Internet-enabled computers with appropriate software. • **Communication Equipment:** Telephones (landline or mobile) • **Document and Printing Tools:** Printers, scanners, photocopiers, filing cabinets or digital archiving systems, and standardised document templates (proposals, quotations, reports, policies). • **Presentation Equipment:** Projectors or large screens, whiteboards, and flip charts • **Office Furniture and Workspaces:** Desks, chairs. • **Data Security Tools:** Secure filing systems/lockers for physical records, encrypted online/cloud storage for digital information. • **Training and Learning Materials:** Training manuals, recorded webinars, tutorials, and e-learning platforms for ongoing development.
CONSUMABLES	**Summary of Consumables** • **Office Supplies:** Paper (A4 standard), notepads, pens, pencils, markers, and highlighters. • **Printing & Copying Consumables:** Stationery

Human Resource Requirements:

RECOGNISED WORKPLACE	
QUALIFICATIONS AND EXPERIENCE	Supervisors must hold an appropriate **NQF Level 5 qualification or above** in insurance or financial services industry. Examples include:

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	• Higher Certificate in Insurance (NQF Level 5) or an equivalent insurance-related qualification. • Higher Certificate in Financial Planning (NQF Level 5) or an equivalent financial services qualification. • Occupational Certificate or other recognised qualification in Insurance, Financial Services or a related discipline at **NQF Level 5 or above**. In addition, supervisors must have: • A minimum of two **(2) years' relevant occupational experience** within the financial services or insurance industry. • Current industry knowledge and experience relevant to the modules being facilitated. • Registration with a recognised professional body, where applicable, will be an added advantage.
FACILITATOR/LEARNER RATIO	Learner ratio must not exceed 1: 10. If learning is not face to face, the group can be larger

ASSESSMENT CENTRE	
QUALIFICATIONS & EXPERIENCE	**ASSESSMENT CENTRE MANAGER:** NQF Level 4 Qualification, and one year experience in overseeing a basic facility such as a training facility or an office facility. **INVIGILATORS:** Ability to communicate in English and proof of successful completion of invigilator training provided by the assessment quality Partner.
INVIGILATOR/CANDIDATE RATIO	1:25 if not face to face

Legal Requirements:

RECOGNISED WORKPLACE	
	Summary of Key Compliance Requirements • FSCA Compliance → Workplace licensed and registered; • OHS Audit, report and certificate • Registered Legal entity • SARS (South African Revenue Services) compliance

ASSESSMENT CENTRE	
QUALIFICATIONS & EXPERIENCE	QCTO accredited assessment centre
FACILITATOR/LEARNER RATIO	Not Applicable

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Additional Requirements:

SKILLS PROVIDER (SDP)	
	None

ASSESSMENT CENTRE	
	None

3.3.3 Exemptions

Providers must apply a QCTO-approved Recognition of Prior Learning (RPL) process when considering granting learners exemptions from modules or module components. The following are examples of learning or work experience that may serve as a basis for exemption for this specific work experience module:

Learners may be eligible for exemption based on the following qualifications, learning or workplace exposure:

• Registered insurance-related qualifications at NQF Level 4 or higher that include policy administration, underwriting support, claims administration or customer service functions.

• Accredited skills programmes, short courses or learning programmes in insurance administration, policy administration, claims administration, insurance operations or insurance regulatory compliance where equivalent workplace outcomes can be demonstrated.

• Work experience gained within an insurer, underwriting manager, brokerage, intermediary, binder holder, policy administration environment, client service centre, contact centre, underwriting support function or claims administration environment.

• Experience in processing insurance documentation, maintaining policy records, supporting underwriting or claims processes, handling customer enquiries, applying compliance requirements or performing insurance administrative functions.

• Evidence of prior workplace learning demonstrating achievement of equivalent work experience outcomes through an approved RPL assessment process.

3.3.4 Additional Assignments to be Assessed Externally

None

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3.4 POSSIBLE SEQUENCING AND INTEGRATION

Listing and order of modules in the sequence in which these modules will follow each other during delivery/implementation. This allows for integration of KM, AM (PM/ WM) as work logically flows.

ORDER	MODULE TITLE	MODULE CODE	LEVEL	CREDITS
1.	Introduction to the insurance industry	431204-002-00-KM-01	4	6
2.	Insurance Industry Operations and Underwriting Administration Support Processes	431204-002-00-WM-01	4	5
3.	Insurance products, services and claims administration	431204-002-00-KM-02	4	8
4.	Deliver customer service	431204-002-00-PM-02	4	5
5.	Process Insurance Products and Service Support	431204-002-00-WM-02	4	10
6.	Policy administration and underwriting support	431204-002-00-KM-03	4	8
7.	Administer policies and support underwriting administration	431204-002-00-PM-01	4	5
8.	Policy Administration and Underwriting Support Processes	431204-002-00-WM-03	4	10
9.	Premium administration	431204-002-00-KM-04	4	6
10.	Perform premium administration duties	431204-002-00-PM-03	4	5
11.	Premium Administration Processes	431204-002-00-WM-04	4	5
12.	Regulatory and compliance framework in insurance	431204-002-00-KM-05	4	8
13.	Perform regulatory and compliance support activities	431204-002-00-PM-04	4	5

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14.	Regulatory and Compliance Support Processes	431204-002-00-WM-05	4	5
15.	Digital tools and technology in insurance administration	431204-002-00-KM-06	4	4
16.	Utilise digital tools and technology in insurance administration	431204-002-00-PM-05	4	5
17.	Digital Systems and Technology in Insurance administration	431204-002-00-WM-06	4	5
18.	Provide claims administration support	431204-002-00-PM-06	4	5
19.	Claims Administration Processes	431204-002-00-WM-07	4	10

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SECTION 4. STATEMENT OF WORK EXPERIENCE

QUALIFICATION TYPE	QUALIFICATION TITLE DESCRIPTOR	NQF LEVEL	CREDITS
National Occupational Certificate	Insurance Administrator	4	120

CURRICULUM CODE	431204-002-00-00

LEARNER DETAILS

NAME:	
ID NUMBER:	

EMPLOYER DETAILS

COMPANY NAME:	
ADDRESS:	
SUPERVISOR NAME:	
WORK TELEPHONE:	
EMAIL:	

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WORK EXPERIENCE MODULE DETAILS

Instructions for Supervisors:

The learner must demonstrate competence in each workplace activity under normal workplace conditions. Supporting evidence should be authentic, current and sufficient. The supervisor must verify satisfactory performance by signing and dating each completed section.

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-01	Insurance Industry Operations and Underwriting Administration Support Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

WORK EXPERIENCE MODULE DETAILS			
WM-01-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Identify the key responsibilities of an insurance administrator.		
WA0102	Follow insurance administration workflows, processes and documentation requirements and organisational procedures accurately and efficiently.		
WA0103	Communicate effectively with clients, colleagues, and service providers.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	Complete policy administration tasks including data capture, updates, and maintenance on insurance administration systems (e.g. policy amendments, endorsements, cancellations).		
SE0102	Evidence of client and internal communication including emails, call logs and task instructions, demonstrating correct information sharing and follow-up.		
SE0103	Supervisor or workplace confirmation of understanding and execution of daily		

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WORK EXPERIENCE MODULE DETAILS			
	insurance administration duties according to organisational procedures.		
NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**
1	Understands the insurance administrator's role by accurately capturing, updating, and maintaining policy and claims information on internal systems.		
2	Understands administrative workflows, including document control, recordkeeping, and adherence to turnaround times in line with organisational procedures.		
3	Communicates clearly and professionally with clients, colleagues, and service providers to obtain, confirm, or relay insurance-related information.		
4	Understands the importance of accuracy in administrative duties to prevent policy errors, client dissatisfaction, or compliance breaches.		

WORK EXPERIENCE MODULE DETAILS Relate insurance and risk principles to workplace activities			
WM-01-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0201	Identify workplace examples of risks that may be transferred or managed through insurance.		
WA0202	Relate insurance products and services encountered in the workplace to risk pooling, risk transfer and financial protection.		
WA0203	Identify how different types of insurance provide financial protection to individuals and businesses.		
WA0204	Explain how insurance administration supports the delivery of insurance products and services.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Completed workplace activity identifying risks and the insurance products or services used to provide financial protection.		

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WORK EXPERIENCE MODULE DETAILS Relate insurance and risk principles to workplace activities			
SE0202	Evidence of workplace examples demonstrating risk pooling, risk transfer or financial protection principles.		
SE0203	Workplace activity or discussion record relating different types of insurance to their benefits for individuals, businesses and the economy.		
SE0204	Supervisor confirmation of the learner's understanding of how insurance administration supports the delivery of insurance products and services.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1	Understand the purpose and function of insurance and risk management within society and the economy.		
2	Understand risk pooling, risk transfer and financial protection principles as observed within insurance operations.		
3	Understand different types of insurance and their role in protecting individuals and businesses.		
4	Understand how insurance administration supports the delivery of insurance products and services.		

WORK EXPERIENCE MODULE DETAILS: Apply professionalism and ethics			
WM-01-WE03	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0301	Use professionalism, integrity and responsible conduct in workplace interactions		
WA0302	Communicate professionally with clients, colleagues, insurers and service providers.		
WA0303	Comply with organisational codes of conduct, confidentiality requirements and ethical standards.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0301	Evidence of completed workplace training or induction relating to ethics,		

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WORK EXPERIENCE MODULE DETAILS: Apply professionalism and ethics			
	professionalism, confidentiality or organisational codes of conduct.		
SE0302	Evidence of secure and confidential handling of client and organisational information.		
SE0303	Workplace examples or supervisor confirmation demonstrating professional conduct in interactions with clients, colleagues, insurers or service providers.		
SE0304	Supervisor feedback or records demonstrating adherence to organisational procedures, appropriate escalation of issues and ethical conduct.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understand professionalism, honesty, respect and responsible conduct in interactions with clients, colleagues and service providers.		
2.	Understand TCF principles, ethical conduct and organisational compliance procedures in daily insurance administration activities, including when supporting clients, processing information and managing data.		
3..	Understanding of accurate record management, professional stakeholder interaction and the escalation of non-compliance in accordance with organisational and industry requirements.		

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS
431204-002-00-WM-02	Process Insurance Products and Service Support	4	10

WORK EXPERIENCE MODULE DETAILS: Identify and explain policy components for administrative purposes			
WM-02-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Identify key components of insurance policy documents.		
WA0102	Explain the purpose of policy schedules, operative clauses, terms, conditions,		

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WORK EXPERIENCE MODULE DETAILS: Identify and explain policy components for administrative purposes			
	exclusions, extensions and endorsements.		
WA0103	Review policy documents for completeness and consistency with available policy records and refer discrepancies in accordance with organisational procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	Evidence of reviewing and explaining policy documents, including schedules, wording, endorsements, excesses, exclusions, and conditions.		
SE0102	Evidence of policy documentation checked for completeness or consistency and discrepancies identified or referred.		
SE0103	Examples of administrative support provided where policy components were clarified to clients, intermediaries, colleagues or service providers.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understands standard insurance policy component, including premiums, sums insured, excesses, exclusions, terms and conditions.		
2.	Understands how policy information is explained accurately and in plain language within the scope of an insurance administrator.		
3.	Understands how policy components may affect cover, claims processes and customer expectations.		

WORK EXPERIENCE MODULE DETAILS: Differentiate insurance products and cover			
WM-02-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0201	Identify different classes and types of insurance products encountered in the workplace		

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WORK EXPERIENCE MODULE DETAILS: Differentiate insurance products and cover			
WA0202	Distinguish product features, cover, benefits, exclusions and limits for administrative purposes.		
WA0203	Provide factual product and policy information within the administrator's authority and refer advice-related enquiries appropriately.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Evidence of workplace exposure to different insurance products, classes and types of cover.		
SE0202	Examples of administrative tasks where product or cover differences were identified and communicated (policy comparisons, internal queries, client enquiries).		
SE0203	Supervisor confirmation that factual product and cover information was provided accurately and advice-related or non-routine enquires were referred appropriately.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understands different insurance products and the types of risks they cover.		
2.	Understands key differences between products, including scope of cover, benefits, exclusions, limits and optional cover.		
3.	Understands the distinction between providing factual product information and providing advice, and the organisational procedures for referral or escalation.		

WORK EXPERIENCE MODULE DETAILS: Handle routine product and policy enquiries and complaints			
WM-02-WE03	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0301	Engage professionally with clients in person, telephonically or through approved digital communication channels.		

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WORK EXPERIENCE MODULE DETAILS: Handle routine product and policy enquiries and complaints			
WA0302	Resolve client enquiries or concerns and provide accurate factual product, policy or administrative information.		
WA0303	Apply organisational communication, recordkeeping and escalation procedures		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0301	Evidence of handling client enquiries relating to products, policies, cover, premiums or administrative processes such as call logs, emails or CRM records).		
SE0302	Evidence of complaints recorded, handled or escalated in accordance with organisational procedures and required timeframes.		
SE0303	Supervisor observation or confirmation demonstrating professional communication, active listening, empathy, accurate information sharing and appropriate escalation.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understand CRM and call logging systems, data privacy requirements and organisational procedures for sharing client information.		
2.	Understand complaint lodgement, -handling and escalation timeframes, internal service level requirements and the role of the relevant ombud structures.		
3.	Understand Treating Customers Fairly principles when handling client enquiries, concerns and complaints.		

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-03	Policy administration and Underwriting Support Processes	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

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WORK EXPERIENCE MODULE DETAILS: Perform policy administration and document management activities			
WM-03-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Process routine new business and renewal documentation and related correspondence under supervision.		
WA0102	Process routine policy amendments, endorsements and cancellations in accordance with organisational procedures and authorised instructions.		
WA0103	Capture, update and verify client and policy information on insurance administration systems.		
WA0104	Verify supporting documentation and file, index and store policy records in approved organisational repositories.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	Evidence of processing routine new business or renewal documentation and related correspondence under supervision.		
SE0102	Evidence of routine policy amendments, endorsements or cancellations processed in accordance with organisational procedures and authorised instructions.		
SE0103	Records demonstrating accurate capture, updating and verification of client and policy information on insurance administration systems.		
SE0104	Evidence of supporting documentation verified, and policy records correctly filed, indexed and stored in approved organisational repositories.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understanding of routine policy administration activities, including new business, renewals, endorsements, amendments and cancellations.		

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2.	Understanding of standard operating procedures for capturing, updating and verifying client and policy information.		
3.	Understanding of document verification, filing, indexing, storage and record control requirements and their importance for compliance and efficient service delivery.		

WORK EXPERIENCE MODULE DETAILS: Participate in internal quality control checks			
WM-03-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0201	Check policy files and administrative records for completeness and accuracy using prescribed checklists or quality control procedures.		
WA0202	Identify and record missing information, discrepancies or administrative errors.		
WA0203	Correct authorised administrative errors or refer discrepancies in accordance with organisational procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Evidence of policy files or administrative records checked for completeness and accuracy using prescribed checklists or quality control procedures.		
SE0202	Evidence of missing information, discrepancies or administrative errors identified and recorded.		
SE0203	Evidence or supervisor confirmation of authorised corrections completed, or discrepancies referred in accordance with organisational procedures.		

NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**
1.	Understand the purpose of quality control checks in insurance administration.		
2.	Understand common administrative errors, including missing documentation, inaccurate information and incomplete data capture.		
3.	Understand organisational procedures for correcting authorised administrative errors and referring discrepancies or non-routine matters.		

FINAL

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-04	Premium Administration Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

WORK EXPERIENCE MODULE DETAILS: Process and reconcile premium transactions and adjustments			
WM-04-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Verify relevant policy and transaction information used in system-generated premium amounts and adjustments.		
WA0102	Verify system-generated premium amounts and allocate and reconcile premium transactions.		
WA0103	Process authorised premium adjustments and refunds in accordance with organisational procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	System records, screenshots or reports showing premium amounts and transactions verified, allocated or reconciled by the learner.		
SE0102	Supervisor confirmation of accurate premium transaction processing and reconciliation.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understand premium components, payment frequency and policy or transaction information relevant to system-generated premium amounts and adjustments.		
2.	Understand insurance administration systems and organisational procedures used to allocate, reconcile and process premium transactions, adjustments and refunds.		

FINAL

WORK EXPERIENCE MODULE DETAILS: Apply premium collection and payment administration procedures			
WM-04-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0201	Process or support premium collection and payment transactions through applicable organisational payment methods and channels.		
WA0202	Verify and record payment information in accordance with organisational procedures and applicable control requirements.		
WA0203	Communicate factual payment information, requirements or payment options to clients or intermediaries within the scope of the administrator role.		
WA0204	Identify failed or dishonoured payments and follow applicable referral or follow-up procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Evidence of premium collection or payment transactions processed, verified or recorded using applicable organisational systems.		
SE0202	Client or intermediary communication relating to payment information, requirements or applicable payment options.		
SE0203	Evidence of failed or dishonoured payments identified and referred or followed up in accordance with organisational procedures.		
SE0204	Supervisor confirmation that premium collection and payment administration procedures were applied correctly.		
NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**
1.	Understand premium collection and payment methods and the organisational controls applicable to their administration.		

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2.	Understand applicable premium collection requirements, payment continuity and customer communication requirements.		
3.	Understand failed or dishonoured payment processes and applicable referral, follow-up and escalation procedures.		

WORK EXPERIENCE MODULE DETAILS: Identify and follow up overdue premium situations			
WM-04-WE03	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0301	Identify overdue or unpaid premiums through system reports, account records or reconciliations		
WA0302	Apply organisational procedures regarding grace periods, arrear notifications and follow-up timelines		
WA0303	Perform routine follow-up communication or refer overdue premium matters in accordance with organisational procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0301	System records or reports showing overdue or unpaid premium situations identified by the learner.		
SE0302	Evidence of arrear notifications, routine follow-up activities or referrals completed in accordance with organisational procedures.		
SE0303	Supervisor confirmation that overdue premium procedures and required timelines were correctly followed.		

NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**
1.	Understand grace periods, overdue premium processes and the potential consequences of non-payment across applicable insurance products.		
2.	Understand organisational communication, follow-up, referral and escalation procedures for overdue premiums.		

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3.	Understand fair customer treatment principles when administering overdue premium situations.		

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-05	Regulatory and Compliance Support Processes	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

WORK EXPERIENCE MODULE DETAILS: Apply regulatory and compliance requirements in insurance administration.			
WM-05-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Identify the regulatory and compliance requirements applicable to routine insurance administration activities within the workplace.		
WA0102	Apply applicable regulatory and compliance requirements when processing insurance information and documentation.		
WA0103	Refer regulatory or compliance matters outside the learner's authority in accordance with organisational procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	Evidence of routine insurance administration tasks completed in accordance with applicable regulatory and compliance requirements.		
SE0102	Completed compliance, onboarding or document-processing checklists demonstrating application of applicable requirements.		
SE0103	Evidence or supervisor confirmation of regulatory or compliance matters appropriately referred or escalated.		
NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**

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1.	Understand the South African insurance regulatory environment and the regulatory requirements relevant to the learner's area of work.		
2.	Understand how applicable regulatory and compliance requirements affect policy administration, documentation and client interactions.		
3.	Understand organisational procedures and authority limits for referring regulatory or compliance matters.		

WORK EXPERIENCE MODULE DETAILS: Apply compliance monitoring and reporting procedures			
WM-05-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0201	Identify potential compliance risks, irregularities or non-compliance within own area of work.		
WA0202	Complete applicable compliance checks and maintain required compliance records.		
WA0203	Report or escalate identified compliance concerns in accordance with organisational procedures.		
WA0204	Participate in routine compliance monitoring or audit-readiness activities where applicable.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Completed compliance checklists, monitoring records or other evidence of routine compliance checks performed		
SE0202	Evidence of compliance risks, irregularities or concerns identified and reported or escalated.		
SE0203	Evidence or supervisor confirmation of participation in compliance monitoring, record verification or audit-readiness activities.		

NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**
1	Understand internal compliance structures, responsibilities and reporting lines		

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2	Understand compliance monitoring, recordkeeping, record-retention and audit-readiness requirements.		
3	Understand organisational procedures for reporting and escalating compliance risks, irregularities or non-compliance.		

WORK EXPERIENCE MODULE DETAILS: Apply consumer protection, policyholder protection and fair-treatment requirements during insurance administration.			
WM-05-WE03	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0301	Apply fair-treatment principles during routine client interactions and insurance administration activities.		
WA0302	Apply applicable customer and policyholder requirements during documentation, policy changes, cancellations, renewals and routine complaints handling		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0301	Evidence of routine insurance administration or client interaction activities demonstrating application of fair-treatment and consumer protection requirements.		
SE0302	Evidence of situations with potential for unfair customer outcomes identified and appropriately referred or escalated.		
SE0303	Supervisor confirmation of conduct consistent with the Consumer Protection Act (where applicable), Policyholder Protection Rules and Treating Customers Fairly (TCF) principles.		
NUMBER	**CONTEXTUALISED WORKPLACE KNOWLEDGE**	**DATE**	**SIGNATURE**
1.	Understand the Consumer Protection Act (where applicable), the Policyholder Protection Rules (PPRs), and Treating Customers Fairly (TCF) principles applicable to insurance administration.		
2.	Understand how Treating Customers Fairly (TCF) principles and the Policyholder Protection Rules apply to client communication, documentation, policy changes,		

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	cancellations, renewals, claims administration support and complaints handling.		
3.	Understand organisational procedures for identifying, preventing and escalating potential unfair customer outcomes.		

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-06	Digital Systems and Technology in Insurance Administration	4	5	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

WORK EXPERIENCE MODULE DETAILS: Utilise digital platforms for insurance administration			
WM-06-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Operate insurance administration systems for data entry and updates		
WA0102	Maintain data integrity and confidentiality within digital systems.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	Screenshots or reports generated from digital systems		
SE0102	Supervisor verification of system transactions completed		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1	Understand systems and workflow in insurance operations		
2	Understand data privacy, confidentiality and information security requirements applicable to insurance administration.		

WORK EXPERIENCE MODULE DETAILS: Generate and use routine operational reports within insurance administration systems			
WM-06-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**

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WORK EXPERIENCE MODULE DETAILS: Generate and use routine operational reports within insurance administration systems			
WA0201	Generate routine policy, premium, claims or workflow reports		
WA0202	Verify report information		
WA0203	Use reports to identify outstanding tasks, exceptions or follow-up actions		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Copies or system evidence of routine policy, premium, claims or workflow reports generated by the learner.		
SE0202	Evidence of report information verified, and outstanding tasks, exceptions or follow-up actions identified.		
SE0203	Supervisor confirmation that reports were generated, verified and used in accordance with organisational procedures.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understand the purpose and use of routine policy, premium, claims and workflow reports within insurance administration.		
2.	Understand basic report interpretation and how operational reports support workflow management and decision-making.		

WORK EXPERIENCE MODULE DETAILS: Use digital communication and collaboration tools to support insurance administration			
WM-06-WE03	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0301	Communicate effectively with clients and colleagues using digital channels.		
WA0302	Manage digital records of communication to ensure traceability and professionalism.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**

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WORK EXPERIENCE MODULE DETAILS: Use digital communication and collaboration tools to support insurance administration			
SE0301	Email correspondence or chat logs evidencing customer or colleague interactions.		
SE0302	Supervisor evaluation of communication and collaboration effectiveness.		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1	Understand professional digital communication etiquette and record-keeping standards.		
2	Understand organisational digital communication protocols and information security requirements.		

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
431204-002-00-WM-07	Claims Administration Processes	4	10	On-the-job. Simulated workplace activities may be used where actual workplace exposure is not available.

WORK EXPERIENCE MODULE DETAILS: Receive, register and maintain claims information and documentation			
WM-07-WE01	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0101	Verify that claim information and supporting documentation correspond with the applicable policy wording and refer the claim in accordance with organisational procedures.		
WA0102	Verify completeness and accuracy of information		
WA0103	Identify potential fraudulent or suspicious claims		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0101	Sample claim forms with validation checks		

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WORK EXPERIENCE MODULE DETAILS: Receive, register and maintain claims information and documentation			
SE0102	Checklist of required supporting documents		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understand policy terms and conditions		
2.	Understand red flags and indicators		

WORK EXPERIENCE MODULE DETAILS: Support claims processing and escalation activities			
WM-07-WE02	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0201	Prepare claims documentation for assessment and payment processing		
WA0202	Verify claims information and supporting documentation before assessment		
WA0203	Update claims records and refer documentation for payment processing		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0201	Claims processing records, system-generated claim records, or supervisor confirmation of claims administration support activities.		
SE0202	System audit logs		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1	Understand claims procedures and workflow		
2	Understand documentation requirements and organisational procedures		

WORK EXPERIENCE MODULE DETAILS: Communicate routine claims progress and maintain claims records			
WM-07-WE03	**SCOPE WORK EXPERIENCE**	**DATE**	**SIGNATURE**
WA0301	Understand the requirements for maintaining accurate and complete claims records and audit trails.		

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WORK EXPERIENCE MODULE DETAILS: Communicate routine claims progress and maintain claims records			
WA0302	Understand professional communication, confidentiality and data protection requirements when communicating claims progress.		
WA0303	Understand routine claims workflow, service standards and escalation procedures.		
	SUPPORTING EVIDENCE	**DATE**	**SIGNATURE**
SE0301	Email, call logs		
SE0302	Audit trail documentation		

NUMBER	CONTEXTUALISED WORKPLACE KNOWLEDGE	DATE	SIGNATURE
1.	Understand the requirements for maintaining accurate and complete claims records and audit trails		
2.	Understand professional communication, confidentiality and data protection requirements when communicating claims progress.		
3.	Understand routine claims workflow, service standards and escalation procedures		

NUMBER	ADDITIONAL ASSIGNMENTS TO BE ASSESSED EXTERNALLY	DATE	SIGNATURE
1.	**None**		

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