

No. 195

2 March 2001

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

### Financial Services

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following unit standards-based qualifications for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purposes of the qualifications, and the titles and specific outcomes of the unit standards upon which qualifications are based. The full qualifications and unit standards can be accessed via the SAQA web-site at [www.saqa.co.za](http://www.saqa.co.za). Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, 659 Pienaar street, Brooklyn, Pretoria.

Comment on the qualifications and unit standards should reach SAQA at the address *below and no later than Friday 23 March 2001*. All correspondence should be marked **Standards Setting – SGB for Financial Services** and addressed to

The Director: Standard Setting and Development  
SAQA  
*Attention: Mrs S. Vasuthevan*  
Postnet Suite 248  
Private Bag X06  
Waterkloof  
0145  
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SAMUEL B.A. ISAACS  
EXECUTIVE OFFICER

## NATIONAL CERTIFICATE IN INSURANCE ADMINISTRATION

**Field:** Business, Commerce and Management Studies

**Sub-Field:** Financial Services: Insurance

**NQF Level:** 2

**Credits:** 120

FUNDAMENTAL	CORE	ELECTIVE	TOTAL CREDITS
<b>46 credits from Level 2</b> <ul style="list-style-type: none"> <li>• Mathematical literacy: <b>16</b></li> <li>• Communication in the language of business: <b>20</b></li> <li>• Financial Literacy (life skills): <b>10</b></li> </ul>	<b>50 credits from Insurance at Level 2</b>	<ul style="list-style-type: none"> <li>• <b>20 credits from Insurance electives at level 2.</b></li> <li>• <b>10 credits from Financial Services/Insurance-related fields at Level 2 or above</b></li> <li>• <b>4 credits of learner's choice at or above Level 2</b></li> </ul>	<b>120 credits</b>  <b>46</b> <b>Fundamental at Level 2</b>  <b>50</b> <b>Core at Level 2</b>  <b>34</b> <b>Electives at level 2 or above.</b>
<b>46 credits</b>	<b>50 credits</b>	<b>34 credits</b>	<b>Total: 120</b>

### Purpose of the Qualification:

The purpose of the qualification is to build knowledge and skill required by entry level employees in insurance administration who have had schooling below NQF level 4. It is intended to empower learners to acquire knowledge, skills, attitudes and values required to operate confidently as individuals in the South African community and to respond to the challenges of the economic environment and changing world of work in the insurance industry.

The National Certificate in Insurance Administration: Level 2 is intended for entry level administration and clerical personnel employed in the insurance sector and other learners who intend to follow a career in insurance. Practical competence is within a limited range of choice and familiar contexts. The focus is on knowledge, skills, values and attitudes in relation to the learner's own context and experience of the world of work.

*Qualifying learners are able to:*

- Identify the various sectors of financial services and the role that insurance plays in the industry.
- Explain the structure of the insurance industry in South Africa.
- Understand the nature of the insurance market in South Africa.
- Understand the structure of an insurance company as a workplace
- Keep informed about current affairs related to the insurance sector.
- Behave in a professional manner in the insurance environment.
- Identify the need for insurance organisations to keep records as evidence of transactions.

#### **Exit-level outcomes**

*Qualifying learners should*

- Recognise the diversity of people who make up the insurance market.
- Understand the structure and functions of an insurance company.
- Make decisions about his/her possible career path in insurance.
- Make decisions about his/her own financial and insurance needs.
- Operate as an informed employee in an insurance workplace.
- Understand the structure and market of the insurance industry in South Africa.
- Be competent in some of the skills needed by entry level personnel with a view to multi-skilling.
- Know why selected procedures are necessary and the implications for a company when employees do not follow required procedures.

## **UNIT STANDARDS FOR INSURANCE ADMINISTRATION**

### **NQF LEVEL 2: CORE UNIT STANDARDS**

1. Title: Indicate the sub-sectors of the Financial Services industry and the role of insurance in the industry.
2. Title: Demonstrate an understanding of the structure of the insurance sector in South Africa.
3. Title: Understand the nature of the insurance market in South Africa.
4. Title: Investigate the structure of an insurance company as a workplace.
5. Title: Keep informed about current affairs related to financial services in general and insurance in particular.

6. Title: Behave in a professional manner in a business environment such as an insurance workplace.
7. Title: Identify the types of records required in the insurance industry and understand why it is necessary to create evidence and maintain confidentiality.

#### LEVEL 2: ELECTIVE UNIT STANDARDS

8. Title: Attend to customer enquiries in the insurance sector.
9. Title: Process numerical and text information in an insurance environment.
10. Title: Receive, distribute and dispatch mail in an insurance environment.
11. Title: Manage time and the work process within the insurance environment.
12. Title: Contribute to the health, safety and security of the insurance industry.
13. Title: Maintain an existing information system in an insurance office environment.
14. Title: Operate and take care of equipment in an insurance office environment.
15. Title: Render basic first aid in the insurance workplace.
16. Title: Recognise the effects of HIV/AIDS in the insurance industry and workplace, and indicate the precautions that are necessary to avoid unnecessary transmission of the HI Virus.

#### UNIT STANDARDS FOR INSURANCE ADMINISTRATION

##### Unit Standards and Specific Outcomes – NQF Level 2

1. Title: **Indicate the sub-sectors of the Financial Services industry and the role of insurance in the industry.**

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| Specific Outcome 1.1: | Name and describe the different services that are classified as financial.   |
| Specific Outcome 1.2: | Demonstrate knowledge and understanding of the concept of insurance and the role of insurance in financial planning. |
| Specific Outcome 1.3: | Explain a contract of insurance.   |
| Specific Outcome 1.4: | Select an insurance product to meet personal needs.  |

**2. Title: Demonstrate an understanding of the structure of the insurance sector in South Africa.**

- Specific Outcome 2.1: Explain the structure of the insurance industry in South Africa.
- Specific Outcome 2.2: Demonstrate knowledge and understanding of the purpose and structure of Lloyd's of London and its place in the South African insurance market.
- Specific Outcome 2.3: Identify some of the professional associations that exist in the insurance industry in South Africa.
- Specific Outcome 2.4: Demonstrate knowledge and understanding of the purpose of a reinsurance company.

**3. Title: Understand the nature of the insurance market in South Africa.**

- Specific Outcome 3.1: Demonstrate knowledge and understanding of the concept of a market as applied to the insurance sector.
- Specific Outcome 3.2: Identify potential clients in the insurance market.
- Specific Outcome 3.3: Survey opinions on the need for insurance in own community.
- Specific Outcome 3.4: Use statistical information to determine the type of insurance most valued by different communities.
- Specific Outcome 3.5: Outline the products and benefits of the various products marketed by a selected organisation.

**4. Title: Investigate the structure of an insurance company as a workplace.**

- Specific Outcome 4.1: Identify the core business activities of a selected insurance company.
- Specific Outcome 4.2: Identify support functions within a selected insurance organisation.
- Specific Outcome 4.3: Explain the role of a selected department or section in an insurance company and its contribution to the effectiveness of the organisation.
- Specific Outcome 4.4: Investigate the different types of work done in the department.

**5. Title: Keep informed about current affairs related to financial services in general and insurance in particular.**

- Specific Outcome 5.1: Identify events in the physical environment that could impact on insurance.
- Specific Outcome 5.2: Identify events in the social environment that could impact on insurance.
- Specific Outcome 5.3: Identify events in the economic environment that could impact on insurance.
- Specific Outcome 5.4: Identify people and companies in the news.

**6. Title: Behave in a professional manner in a business environment such as an insurance workplace.**

- Specific Outcome 6.1: Demonstrate knowledge of appropriate behaviour in an insurance environment.
- Specific Outcome 6.2: Interpret body language in the insurance environment.
- Specific Outcome 6.3: Meet people in a business setting.
- Specific Outcome 6.4: Demonstrate an understanding of basic business ethics in the insurance sector.

**7. Title: Identify the types of records required in the insurance industry and understand why it is necessary to create evidence and maintain confidentiality.**

- Specific Outcome 7.1: Explain why insurance companies record and keep information.
- Specific Outcome 7.2: Name and describe the types of records that are specific to an insurance contract.
- Specific Outcome 7.3: Indicate the type of records that are kept in respect of a claim against on an insurance contract.
- Specific Outcome 7.4: Locate and provide records to users on request.

**8. Title: Attend to customer enquiries in the insurance sector.**

- Specific Outcome 8.1: Greet a customer and identify his/her need or problem.
- Specific Outcome 8.2: Attend to customer telephone, facsimile and electronic requests.
- Specific Outcome 8.3: Refer a customer's request.
- Specific Outcome 8.4: Respond to a customer face-to-face and on the telephone.

**9. Title: Process numerical and text information in an insurance environment.**

- Specific Outcome 9.1: Identify and access the correct database.
- Specific Outcome 9.2: Process and check numerical data on an insurance database.
- Specific Outcome 9.3: Process and check text on an insurance database.
- Specific Outcome 9.4: Save and store original information.

**10. Title: Receive, distribute and dispatch mail in an insurance environment.**

- Specific Outcome 10.1: Receive and sort mail.
- Specific Outcome 10.2: Distribute and dispatch mail.
- Specific Outcome 10.3: Demonstrate knowledge and understanding of the importance of the processes followed in the mailroom and why it is necessary to create evidence.
- Specific Outcome 10.4: Maintain confidentiality of information in the mail system.

**11. Title: Manage time and the work process within the insurance environment.**

- Specific Outcome 11.1: Create, use and maintain a task list.
- Specific Outcome 11.2: Use and maintain a diary.
- Specific Outcome 11.3: Prioritise tasks.
- Specific Outcome 11.4: Plan and follow a work schedule.

**12. Title: Contribute to the health, safety and security of the insurance workplace.**

- Specific Outcome 12.1: Identify potential hazards in the insurance workplace.
- Specific Outcome 12.2: Demonstrate knowledge of how to limit damage to persons or property in the event of an accident or emergency.
- Specific Outcome 12.3: Demonstrate knowledge of how to contribute to the maintenance of security in the workplace.
- Specific Outcome 12.4: Explain emergency procedures in the workplace.

**13. Title: Maintain an existing information system in an insurance environment.**

- Specific Outcome 13.1: Store information using an existing storage system.
- Specific Outcome 13.2: Retrieve information from an existing storage system.
- Specific Outcome 13.3: Store valuable documentation and reference materials securely.
- Specific Outcome 13.4: Maintain confidentiality of customer and company information.

**14. Title: Operate and take care of equipment in an office environment.**

- Specific Outcome 14.1: Follow instructions to operate equipment.
- Specific Outcome 14.2: Maintain equipment in a clean and working condition.
- Specific Outcome 14.3: Monitor and request equipment consumables.
- Specific Outcome 14.4: Recognise and take steps to minimise risks to safety when operating equipment in an office environment.

**15. Title: Render basic first aid in the insurance workplace.**

- Specific Outcome 15.1: Deal with a first aid situation in the insurance workplace.
- Specific Outcome 15.2: Identify the cause and treat a bleeding wound.
- Specific Outcome 15.3: Recognise the symptoms and treat an injured person for shock.
- Specific Outcome 15.4: Recognise and immobilise a fracture.
- Specific Outcome 15.5: Recognise and deal with minor medical conditions in the workplace.
- Specific Outcome 15.6: Demonstrate knowledge and understanding of the procedures that apply when someone is injured or falls ill at work.

**16. Title: Recognise the effects of HIV/AIDS in the insurance industry and workplace, and indicate the precautions that are necessary to avoid unnecessary transmission of the HI Virus.**

- Specific Outcome 16.1: Demonstrate knowledge and understanding of HIV/AIDS and its effects on the human immune system.



- Specific Outcome 16.2: Demonstrate knowledge and understanding of how HIV/AIDS is transmitted.
- Specific Outcome 16.3: Demonstrate knowledge of what behaviour is safe and what behaviour carries the risk of HIV transmission.
- Specific Outcome 16.4: Demonstrate knowledge of what guidelines and assistance are available to support workers with HIV/AIDS and recognise own role in creating a caring office environment.
- Specific Outcome 16.5: Demonstrate knowledge and understanding of the implications of the HIV/AIDS pandemic for society, the economy and the insurance industry.