

FSPITS19 - SQA Unit Code H694 04

Provide technical advice and support regarding complex insurance matters to others



Overview

This unit is about utilising your technical competence to provide advice and support regarding complex insurance matters to others, who might include colleagues, both in and outside your organisation, and also clients. It includes establishing the nature of advice/support needed and providing this in the most appropriate manner whilst checking that it fulfils colleagues/clients' requirements.

Insurance matters are complex when they address aspects that are not routine and cannot be dealt with mechanistically. For example, such matters might involve negotiations and/or might be technically demanding involving complex legal or underwriting issues, complex risk evaluation or substantial financial implications.

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Performance criteria

- You must be able to:*
- P1 Establish and assess the technical advice or support regarding complex insurance matters sought by others
 - P2 Determine the most appropriate advice and support, and provide this in ways that help others to progress
 - P3 Choose a style of providing support that meets the needs of those seeking your assistance regarding complex insurance matters
 - P4 Provide advice and support regarding complex insurance matters in a manner and at a speed which is appropriate to meeting the needs of those seeking your assistance
 - P5 Check that the support being provided is helping others to progress
 - P6 Adjust the advice or support being provided where necessary in response to both verbal and non-verbal feedback
 - P7 Check that information you are providing is current, accurate and complete
 - P8 State the level of confidence that can be placed upon information that you are providing, where appropriate, including whether it is evidence based or personal opinion
 - P9 Communicate information only to those who have a right to it, in line with your organisational procedures and legal requirements
 - P10 Explain any jargon, technical terms or abbreviations where relevant
 - P11 Confirm that the technical advice or support regarding complex insurance matters provided addresses the requirements of others
 - P12 Ensure that the technical advice and support needed is within your levels of authority or competence to provide
 - P13 Refer others to relevant support services or specialists, where necessary

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 How to identify people's requirements for technical advice and support
- K2 The importance of providing information only to those who have a right to it
- K3 The technical advice and support that others may require, and the most appropriate ways of providing this
- K4 The importance of checking the currency, accuracy and validity of the information and advice being provided and how to do this
- K5 The importance of structuring your advice and support in ways that help others' understanding, and ways of doing this
- K6 How to put those seeking your assistance at ease
- K7 Types of verbal and non-verbal feedback that indicate understanding by others
- K8 How to identify and use different ways of providing support
- K9 The importance of explaining technical terms, jargon and abbreviations
- K10 The importance of confirming that the technical advice and support provided has fulfilled others' requirements and ways of ensuring this
- K11 How to encourage others to recognise their own achievements

Financial services specific knowledge and understanding

- K12 The structure of the insurance market, and the roles and responsibilities of the various parties within it as they impact upon your activities

Context specific knowledge and understanding

- K13 Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including ethical standards and health and safety, as they impact on providing technical advice and support regarding insurance matters
- K14 Your organisation's insurance products and services relevant to your area of operations
- K15 Your organisation's business plan and objectives relevant to your area of responsibility
- K16 The principal roles and responsibilities of those colleagues to whom you are providing technical advice and support
- K17 The technical terms, jargon and abbreviations often used in the context of your working environment
- K18 Your own levels and limits of authority and competence with regard to providing technical advice and support to others, and to whom to refer should these be exceeded

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Additional Information

Behaviours

You must demonstrate that:

1. You make time available to support others
2. You show respect for the views and actions of others
3. You work to develop an atmosphere of professionalism and mutual support

Links to other NOS

‘Signposting’ other relevant NOS

There is a close relationship between these NOS and the NOS for General Insurance, which have been developed separately by the Financial Skills Partnership (formerly Financial Services Skills Council). These can be accessed via www.financialskillspartnership.org.uk

In addition, the Sector Skills Body, Skills CFA, have developed NOS which include the competences required for leadership and management, as well as customer service. The website address for Skills CFA is www.cfa.uk.com

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