GP2Y 22   SVQ Providing Financial Services at SCQF level 5

To attain the qualification candidates must complete **six** units in total. This comprises:

♦   three mandatory units
♦   three optional units

Please note the table below shows the SSC identification codes listed alongside the corresponding SQA unit codes. It is important that the SQA unit codes are used in all your recording documentation and when your results are communicated to SQA.

Mandatory units: Group A — Candidates must complete all three mandatory units				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
J1D8 04	FSPFCC01	Review and Develop Yourself to Improve and Maintain Workplace Competence in a Financial Services Environment	5	5
H5F0 04	FSPFCC02	Plan and Organise Your Work in a Financial Services Environment	5	5
J1D9 04	FSPFCC04	Comply with Regulations in Your Financial Services Environment	5	5

Optional units: Candidates must complete three units. Candidates must select three units. Two units must be taken from one or more of the specialist groups and one unit must be taken from the cross-sector group.

Specialist groups

Bank and Building Society Accounts				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
H5F3 04	FSPBA01	Set Up Bank Accounts for Customers	5	4
H5F5 04	FSPBA03	Authorise Financial Transactions Using Telecommunications	5	4
H5F6 04	FSPBA04	Operate a Sterling Counter Till	5	4
H5F7 04	FSPBA05	Operate a Multi-Currency Till	5	5
H5FB 04	FSPBA09	Process Documentation for Bank or Building Society Accounts	5	4
H5FC 04	FSPIO14	Build Effective Relationships with Clients in a Financial Services Environment	5	4
H5FE 04	FINRFSGF1	Provide Information to Customers in a Financial Services Environment	5	4
H5FF 04	FINPFSGFS02	Deal with Requests to Cancel Financial Services Products or Services	5	4

Customer Payments for Financial Products and Services				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
H5FJ 04	FSPCP01	Process Customers' Financial Transactions	5	4
H5FK 04	FSPCP02	Assess and Use Financial Information to Reconcile Accounts	5	4
H5FL 04	FSPCP03	Operate Credit Control Procedures	6	4
H5FM 04	FSPCP04	Prepare and Pursue Statements of Account for Financial Products and Services	5	4
H5FN 04	FSPCP05	Operate Payment by Instalments	5	4

Specialist groups (cont)

General Insurance				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
J1D4 04	FSPGI01	Process Straightforward Insurance Claims Notifications	5	6
H5FT 04	FSPGI02	Settle Straightforward Insurance Claims	5	6
H5FV 04	FSPGI03	Deal with Straightforward Claims for Insured Losses	5	6
H5FX 04	FSPGI05	Process Straightforward Claims for Uninsured Losses	5	5
H5G2 04	FSPGI09	Agree Settlement of Straightforward Claims for Uninsured Losses	5	6
H5G4 04	FSPGI11	Process Straightforward Insurance Business as an Intermediary	5	6
H5G5 04	FSPGI12	Process Straightforward Insurance Renewals as an Intermediary	5	6
H5G6 04	FSPGI13	Process Straightforward Mid-term Insurance Amendments	5	6
H5GB 04	FSPGI18	Underwrite Straightforward New Risks	5	5
H5GC 04	FSPGI19	Process Insurance Policy Documentation	5	5
H5GD 04	FSPGI20	Process Straightforward Insurance Renewals	5	5
H5FE 04	FINRFSGF1	Provide Information to Customers in a Financial Services Environment	5	4
H5GE 04	FSPGI26	Underwrite Straightforward Policy Alterations	5	5

Investment Operations				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
H5H7 04	FSPI010	Assess and Use Financial Information to Reconcile Stakeholder Investment Accounts	5	5
H5H9 04	FSPI012	Process Payments Relating to Stakeholder Investment Transactions or Accounts	5	4
H5FC 04	FSPI014	Build Effective Relationships with Clients in a Financial Services Environment	5	4

Specialist groups (cont)

Life, Pensions and Investments				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
H5HA 04	FSPLPI01	Process Straightforward New Life, Pensions and Investment Business Quotations	5	3
H5HB 04	FSPLPI02	Underwrite Straightforward Alterations to Life, Pensions and Investment Contracts	5	4
H5HC 04	FSPLPI03	Process Straightforward Requests for Payment Against Life, Pensions and Investment Contracts	5	4
H5HG 04	FSPLPI07	Process Documentation for Straightforward Life, Pensions and Investment Contracts	5	5

Financing and Credit				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
H5HY 04	FSPFC09	Process Applications for Financing and Credit Facilities	5	4
H5J0 04	FSPFC10	Process Documentation for Financing and Credit Facilities	5	4

Administration for Mortgage and/or Financial Planning Intermediaries				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
J1D5 04	FSPAMFPI01	Provide an Administrative Service for Mortgage or Financial Planning Clients	5	4
J1D6 04	FSPAMFPI02	Process Instructions for Straightforward Mortgage or Financial Planning Business	5	4
J1D7 04	FSPAMFPI03	Contribute to Reports for Mortgage or Financial Planning Clients	5	4

Cross-sector				
SQA code	**SSC code**	**Title**	**SCQF level**	**SCQF credits**
FE1V 04	CFACSB2	Deliver Reliable Customer Service	5	5
H9YD 04	CFACSC3	Resolve Customer Service Problems	5	6
H5JW 04	FSPFCS02	Deal with Customers by Telephone in a Financial Services Environment	5	5
H5K9 04	FSPFSSP01	Promote the Organisation's Additional Financial Services Products and Services	5	4
FM4F 04	CFAMLA3	Develop Your Personal Networks	9	10
H5KB 04	CFASLS71	Generate and Follow-up Sales Leads	6	6
H5KC 04	CFASLS73	Sell Products or Services Over the Telephone	5	6
H5KD 04	CFASLS72	Sell Products or Services Face-to-Face	5	6