



FETC: Short Term Insurance Logbook and Workplace Assessments

Qualification Name: FETC: Short Term Insurance

Qualification Number: 49929 aligned to SAQA Qualification ID 66610

Learnership LGA Nr: _____

Learner Name and Surname: _____

Learner Contact Number: _____

Learner Email Address: _____

Learner ID Number:

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Mentor Name and Surname: _____

Mentor Contact Number: _____

Mentor Email Address: _____

Roles and Responsibilities

Employer Responsibilities:

- ▶ Select and Appoint Accredited Training Provider that has scope for the qualification
- ▶ Select, inform, induct and sign learnership contract
- ▶ Submit learnership contract to INSETA timorously as stipulated on the agreement
- ▶ Adherence to learnership contract
- ▶ Appoint a internal mentor for every 3 to 5 learners
- ▶ Relevant resources to be made available to assist learner with completion of assignments e.g Internet, library, subject matter expert, ect
- ▶ Learners to be rotated or be exposed to all areas within the organisation relevant to the qualification
- ▶ Submit a motivation to INSETA for approval where rotation is not possible and indicate how exposure is going to be provided
- ▶ Allow learners time off to write the summative assessment and/or remediation's

Mentor Responsibilities:

- ▶ Mentor must meet with the learners on a minimum of bi-monthly basis (or as often as necessary)
- ▶ Mentor to sign logbook on a monthly basis and ensure that it is submitted to the training provider at the 6 months and 12 months interval of the learnership
- ▶ Mentor- learner contract to be signed
- ▶ Oversee and mentor learners w.r.t. workplace assessments
- ▶ Oversee that learners meet the submission due dates of formative assessments
- ▶ Provide guidance in areas needed

Learner Responsibilities:

- ▶ Adhere to all employer/provider/INSETA codes of conduct, policies and ethics
- ▶ Attend and actively participate in facilitation sessions
- ▶ Complete workplace assessments and formative assessments with quality, comprehensive and relevant information
- ▶ Submit all assessments by the agreed submission due date to be permitted to write the summative assessment
- ▶ Complete the logbook on a weekly basis, indicating times spent in the workplace e.g. 8am – 4pm = 8 hours per day
- ▶ Complete the logbook giving a comprehensive outline of functions performed daily e.g. 4 x assessed claims
- ▶ Present the logbook to the mentor at the monthly meeting for sign-off
- ▶ Prepare adequately for the summative assessment

Training Provider Responsibilities:

- ▶ Induction session with mentors at the start of a learnership (Expectations, overview of logbook and workplace assessments, etc)
- ▶ Provide learner with the logbook template
- ▶ Ensure that learners' workplace experience is relevant to the unit standard/qualification being assessed
- ▶ Present logbook and workplace assessment to the INSETA Verifier at the 6 months and 12 months verification visits during the learnership

Assessor Responsibilities:

- ▶ Link functions performed to the Associated Assessment Criteria
- ▶ Record a competency judgment(s)
- ▶ Make recommendations to the learner and mentor on areas that need exposure within the next month
- ▶ Give feedback to the learner and mentor within 10 days of monthly submission
- ▶ Give constructive guidance to the learners on development areas

Stakeholder	Signatures	Date
Employer		
Mentor		
Learner		
Training Provider		
Assessor		

Declaration of authenticity

Declaration by Learners

I (*learner name and surname*) _____, ID Nr _____ hereby declare that the work contained herein was completed by me on my own.

Where assistance or advice was received or where I used resource material from a workbook, policy wording, internet or any other printed sources, this has been acknowledged and referenced. I further declare that I understand that plagiarism is a punishable offence as it constitutes the theft of another's intellectual property rights.

Learner Signature

Date

Declaration by Mentor

I (*mentor name and surname*) _____, ID Nr _____ hereby declare that the learner is being mentored by myself and that the functions listed and the working hours is a true reflection of the learners situation. According to my knowledge I declare that this is his/her own work.

Employer Signature

Date

Logbook

AAC

- 1.1 Current events and developments that could impact on Short Term Insurance are analysed and discussed and a personal point of view is offered in the discussion indicating ability to anticipate or predict future trends
 - 1.2 Knowledge learnt in various Unit Standards and current events as they occur are integrated with a developing understanding of the Short Term environment in general and a selected career path in particular, so that knowledge of the industry is applied in authentic situations.
 - 1.3 Information is gathered, analysed, summarised, interpreted from a range of sources and presented reliably and accurately. Positions taken are motivated and substantiated
 - 1.4 Different Short Term products, policy documents and schedules are analysed to determine cover.
 - 1.5 Important areas of Short Term Insurance are explained with reference personal or commercial/business Insurance.
- 2.1 The basic principles and different forms of individual income tax are explained with reference to an individual's liability and duty to pay tax.
 - 2.2 Basic financial statements are analysed and used to make a personal financial decision.
 - 2.3 Knowledge of financial risk is applied and managed in own life.
- 3.1 Methods, procedures and techniques of Short Term Insurance are explained with reference to specific company policy, and industry practices.
 - 3.2 Information is gathered, analysed, evaluated, interpreted, recorded and presented and decisions are explained within own authority limits or mandate and with due regard for compliance.
 - 3.3 The concept of ethics is explained with reference to an organisations code of conduct and an individual's personal and property rights.
 - 3.4 Knowledge of legislation is applied to Short Term Insurance.
 - 3.5 Risks associated with non-compliance or non-activity that could result in liability are identified within the context of Short Term Insurance.
 - 3.6 Knowledge of personality styles and emotional intelligence are applied to customer service.
- 4.1 Own work meets generally accepted standards in terms of output and behaviour.
 - 4.2 Interpersonal relationships contribute to sound team dynamics.
 - 4.3 The learner is able to reflect on own practice with a view to improving work performance

- ▶ **Note:** Assessor to indicate AAC number next to the functions performed in the logbook template below.
- ▶ Between 40-60% of AACs to be covered in the workplace (depending on the practical component of the qualification)
- ▶ Unit Standard only achieved after the AACs have been assessed

JAN	FEB	MARCH	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
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Month: Tick the month in question

Week 1: ___/___/20___ to ___/___/20___

Department: _____

Functions performed (comprehensive/quantitative)		Hours Worked on this item during the week	Performance Rating by Coach/Mentor (1 = poor to 5 = Excellent)	Alignment of AAC to functions (Assessor)
E. g. Compiled 4 Short term insurance quotations		4 hours	3	1.1, 1.4, 1.5. 3.5, 3.6
Leave/Public Holidays taken				
Learner Comments		Learner Signature		

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Month: Tick the month in question

Week 2: ___/___/20___ to ___/___/20___

Department: _____

Functions performed (comprehensive/quantitative)	Hours Worked on this item during the week	Performance Rating by Coach/Mentor (1 = poor to 5 = Excellent)	Alignment of AAC to functions (Assessor)
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Coach Signature		Coach Comments				
Assessor Signature		Assessor Comments		C		NYC
Moderator Signature		Moderator Comments		C		NYC

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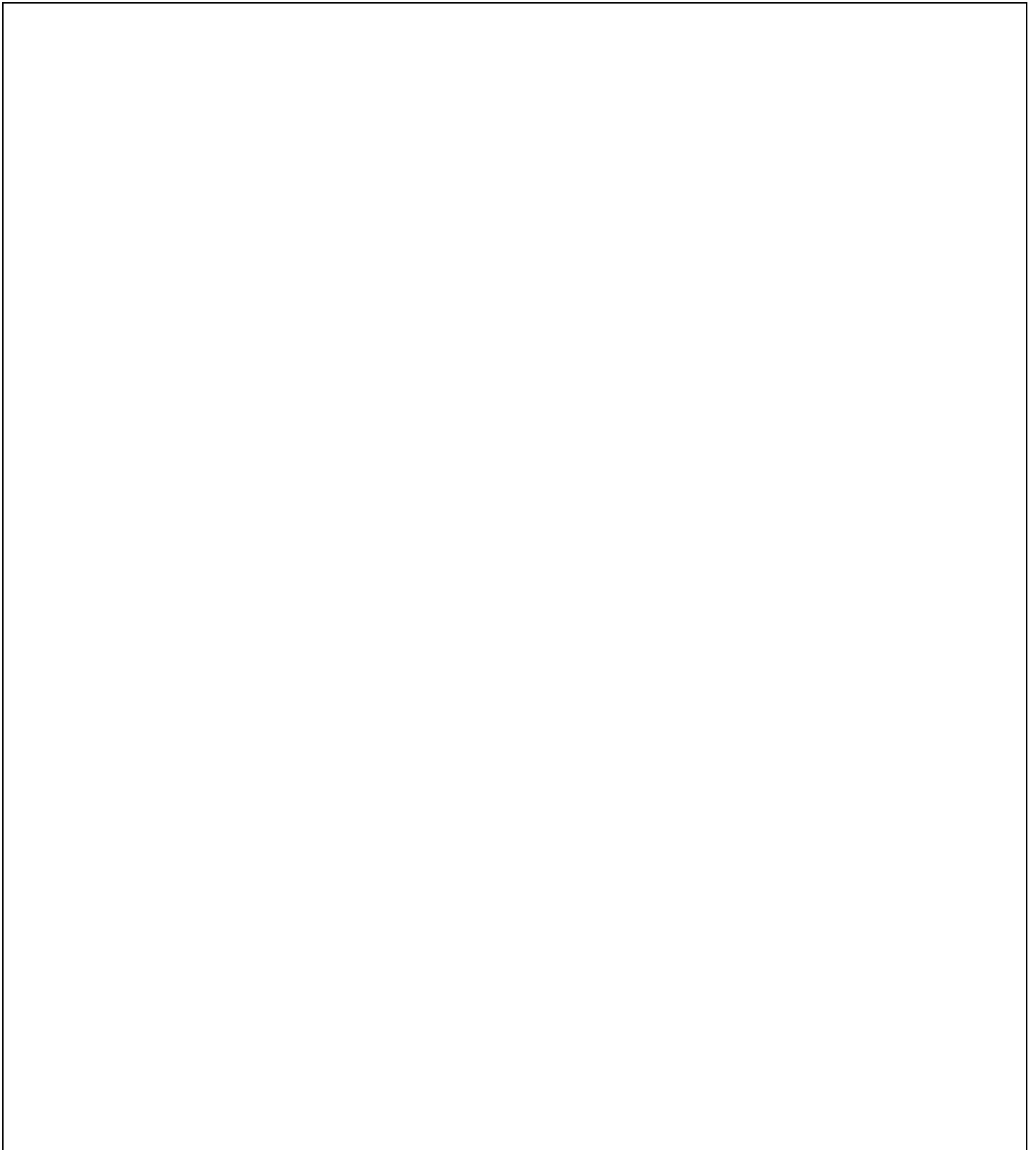
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Month: _____

Coach Signature		Coach Comments				
Assessor Signature		Assessor Comments		C		NYC
Moderator Signature		Moderator Comments		C		NYC

FETC: Short Term Insurance Qualification
Annexure A

Job Description/ KPAs

A large, empty rectangular box with a thin black border, occupying most of the page. It is intended for the user to provide a job description or key performance areas (KPAs) for the role.

Workplace Assessment

After successful completion of this Learnership the learner will be;

Qualified in: FETC: Short Term Insurance (49929)

Qualified as: Including but limited to the following positions:

- Short Term Insurance Underwriter
- Call Centre operators
- Claims administrators

Qualified to be knowledgeable in:

- Carrying out basic research, information gathering and analysis.
- Interpreting current affairs and their influence on Short Term Insurance.
- Communication and Mathematical Literacy at a level that allows them to operate effectively in the financial services industry.
- Behaviour and ethics in a work environment and the implications, consequences and liability arising out of non-compliance with relevant legislation.
- Managing aspects of personal finances.
- Knowledge of Short Term personal and/or commercial lines products.
- Customer care including internal and external customers.
- Understanding the key terms, rules, concepts and principles of the Short Term sub-sector, in general and their chosen career path, in particular.
- Knowledge of insurable risk and application of the law of contract in Short Term Insurance.
- Managing an information system used in Short Term Insurance.

Input: Company specific processing and systems training provided.

Exit Level Outcome 1: Carry out basic research tasks and applying literacy and numeracy skills to analyse, interpret and evaluate information from a range of sources related to Long-term insurance or reinsurance and the assessment of risk.

Exit Level Outcome 2: Manage personal finances and risk.

Exit Level Outcome 3: Apply knowledge of legislation, ethics, compliance and organisational protocols in the Short Term Insurance environment.

Exit Level Outcome 4: Manage own work situation and interpersonal interactions.

3) Distinguish between a personal lines and commercial lines policy in terms of cover provided, exclusions, additional benefits and factors influencing rating. **(20)**

Score : ____/20

C

NYC

4) Prepare a process flow document for a personal lines or commercial lines policy from the initiation to closure. Prepare this on an electronic template. **(40)**

Blank area for the process flow document.

Score : ____/40	C		NYC	
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Grand Total: _____/100	C		NYC	
Assessor Signature:		Date:		
Moderator Signature:		Date:		